

## CHAPTER I

### *Introduction*

1. The proportion of office workers in the labour force is probably about ten times greater today than it was one hundred years ago; and there is every indication that administrative and clerical staff will continue to increase in number more rapidly than other employees, particularly in the manufacturing sector. In the last four decades alone, the number of office workers has grown (according to the Censuses of Population) from about 1½ millions to well over three millions; and in the period 1953-63 it increased on average by 3.0 per cent each year compared with an increase of 0.7 per cent in the total labour force. The further spread of computers and automatic data processing over the next few years will help to contain the increase in demand for office staff; it is most unlikely to reduce that demand.<sup>1</sup>

2. This rise in the proportion of 'white collar' jobs has meant, and will continue to mean, a rapid increase in administrative costs and, of course, in the ratio of office wages and salaries to the total wages and salaries bill. It will probably also mean, in many areas, a shortage of suitable trained clerical staff. These are sufficient reasons why industry should devote as much attention to the training and effective utilisation of office staff as of technical and manual staff. Moreover, as Table I shows, a very significant proportion of young school-leavers enters clerical employment. In almost every year from 1951-65 over 20 per cent of young persons entering employment for the first time went into clerical work. In the case of girls the proportion was usually well over 35 per cent. It is essential that so large a section of the country's youth (one might almost say 'one quarter of our future') should have adequate training and further education at the start of their careers.

3. Unfortunately the evidence, as we shall indicate in Chapter II, is that a majority of employers give little attention to the systematic training and development of office staff. In the survey we carried out we found that no more than 8 per cent of office staff *under the age of 21* were being trained, and about 7 per cent were being released by their employers to attend a course of further education. There is only one nationally recognised train-

<sup>1</sup> Ministry of Labour Manpower Research Unit: "Manpower Studies No. 4: Computers in Offices" p.40. H.M. Stationery Office, 1965.

TABLE 1

## YOUNG PERSONS ENTERING EMPLOYMENT 1951-1965

Year	Entering Clerical Employment			Total Entering Employment			Percentage Entering Clerical Employment		
	Boys (1)	Girls (2)	Total (3)	Boys (4)	Girls (5)	Total (6)	Cols. 1 and 4 (7)	Cols. 2 and 5 (8)	Cols. 3 and 6 (9)
1951...	27,471	84,615	112,086	277,277	265,076	542,353	9.9	31.9	20.7
1952...	24,052	80,325	104,377	266,853	256,056	522,909	9.0	31.4	20.0
1953...	24,631	83,485	108,116	280,519	270,408	550,927	8.9	30.9	19.6
1954...	22,636	79,113	101,749	258,442	246,628	505,070	8.8	32.1	20.1
1955...	21,659	83,366	105,025	259,620	248,125	507,745	8.3	33.6	20.7
1956...	19,762	81,720	101,482	246,949	235,494	482,443	8.0	34.7	21.0
1957...	21,326	85,357	106,683	260,328	244,051	504,379	8.2	35.0	21.2
1958...	23,797	88,892	112,689	269,805	253,761	523,566	8.8	35.0	21.5
1959...	28,423	98,475	126,898	293,996	277,518	571,514	9.7	35.5	22.2
1960...	30,406	99,786	130,192	286,311	261,516	547,827	10.6	38.2	23.8
1961...	28,475	107,263	135,738	302,525	284,933	587,458	9.4	37.6	23.1
1962...	30,195	113,496	143,691	335,951	321,322	657,273	9.0	35.3	21.9
1963...	33,959	107,615	141,572	303,956	280,422	584,378	11.2	38.4	24.2
1964...	33,958	114,890	148,848	314,813	293,490	608,303	10.8	39.1	24.8
1965...	29,107	108,154	137,261	291,226	268,513	559,739	10.0	40.2	24.5

Source: Records at Youth Employment Offices of the numbers of young persons under 18 years of age, to whom National Insurance Cards had been issued after the completion of full-time education, and had started, or were about to start, work.

ing scheme for clerical staff in existence—the Commercial Apprenticeship Scheme—though several industries have worked out schemes of their own which have been commended to employers. Whilst making generous allowance for the fact that firms have in the past expected to recruit some categories of staff fully trained from technical colleges and secretarial schools, we cannot but endorse what was said by the President of the Association of British Chambers of Commerce at the inauguration of the Commercial Apprenticeship Scheme in 1957:

‘There has been too much readiness to think in terms of the shop floor, the laboratory and the drawing office rather than the needs of the business as a whole . . . The achievements brought about by the laboratory can be lost unless the commercial side is maintained at an equal pitch of efficiency.’

There is no doubt that in the last few years a good number of firms have taken steps to improve training arrangements for their office staff; but the impression we have gained from our enquiries is that only a minority of establishments have formal

training schemes of any kind. Although no doubt much training goes on in an informal way, it is certain that it is usually somewhat haphazard, unsystematic and limited in its scope.

4. This being so, it is perhaps worth emphasising at the outset some of the reasons why systematic and planned training of office staff is becoming more and more necessary to the efficient conduct of a business. First of all, as we have said, in many companies administrative costs show a tendency to increase more than proportionately to total costs. Improvements in the efficiency of office manpower can therefore make a substantial contribution to a firm's profitability. Secondly, given the relatively high 'natural' turnover of female staff, it is clearly desirable that young women recruited to a firm's office should become effective as early as possible; besides which, there is some evidence that sound training helps to minimise turnover. Thirdly, the days when firms could rely on a plentiful supply of intelligent young men to undertake routine clerical work have largely gone by. Young people of ability will tend to stay on at school and become available only at the age of 18 or 21 and will then expect to be trained for responsible posts. Much more attention may therefore have to be given to training those who will fill routine clerical positions.

5. Finally, it is scarcely necessary to add that the rapid changes that can be anticipated in the future (for example, electronic data processing) will call for more adaptable office staff, better informed about business, and with the ability to understand and operate complex systems without costly errors. To this end a bigger training and re-training effort on the part of employers will be essential.

### **The Committee's Approach and Objectives**

6. Our terms of reference were very widely drawn. The range of clerical occupations and skills is much too extensive to allow us to do justice to all of them—at least in this initial report. We therefore have decided to concentrate on the training requirements of young people (roughly defined as the under twenty-ones) employed in the most numerous office jobs. The Census tables for 1961 give, under the heading 'office workers', the following details regarding jobs and numbers employed:

	<i>Males</i>	<i>Females</i>	<i>Total</i>
Clerks, Cashiers, Machine Operators:	1,067,630	1,251,080	2,318,710
Typists, Shorthand Writers, Secretaries:	14,830	704,760	719,590

We have attempted, initially, to frame recommendations for the training of those young people who are to be employed in these occupations. Our main emphasis has been placed on initial basic training, so that we have not considered the special needs of those requiring refresher courses (e.g. married women returning to employment after a gap of some years). Nor have we attempted to draw up detailed recommendations for the training of any particular groups of commercial staff (e.g. sales, export) within the broad categories mentioned above. We look forward to examining these and similar issues in due course.

### Computer Personnel

7. In thus limiting our field of enquiry we may be accused of having concentrated unduly on the 'traditional' types of clerical employment and left out of account the 'growth' occupations. Among the most important of these are the occupations which have come into being as a result of the application of computers to business data processing. The Ministry of Labour Manpower Research Unit has estimated that the number of computers delivered for office work in Great Britain will increase from 265 in 1965 to 1,030 in 1973. By the latter date, over 6,000 computers may have been installed.<sup>2</sup> This development will greatly increase the demand for such staff as computer programmers and systems analysts as well as computer operators. We have considered whether we ought in these circumstances to give special attention to training for these categories.

8. We understand, however, that a good deal of consideration is already being given within Government Departments to the supply of computers and to the education and training of the staff needed for all aspects of their use. An official inter-departmental working party under the Department of Education and Science is currently considering what steps need be taken within the educational system to improve the supply of trained computer personnel; and the Ministry of Technology has organised a consultative group of major computer manufacturers and consultants which is examining, among other things, the question of training for different categories of computer staff (with special emphasis on systems analysts). We concluded that it would be wasteful to seek to duplicate the discussions already in train. We hope however that any conclusions reached will be quickly brought to the notice of the Committee and of the training boards;

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<sup>2</sup> *Ibid*: Appendix 16.

and that the boards will be prepared to encourage the development of such training courses as are found to be most needed.

### **The Committee's Recommendations**

9. In our recommendations we have aimed to establish what are the most important conditions and features of sound training schemes for different types and levels of younger office worker. We have not tried to set down detailed training programmes or syllabuses. Indeed, we believe this is not merely undesirable but impossible. Jobs with the same title vary quite considerably in scope and responsibility from firm to firm, and it would be wrong for us to suggest that the same 'model' programme should be followed in every case. Training programmes must therefore be worked out by individual firms, or groups of firms, to take account of their requirements and of their circumstances. This flexibility is essential if training is to be effective.

10. We recognise, however, that there may be dangers in encouraging firms to construct training syllabuses which are geared solely to their own—perhaps quite limited—requirements and which may not enable the trainee subsequently to work in a different firm or move to a more demanding or responsible job. *Upward and lateral mobility must be encouraged by the training given.* The individual's and the industry's needs should not be overlooked in planning training in and for a firm. In this connection we would observe that training for the needs of the industry, as well as the firm, does not impose unreasonable demands on the employer. Through its grant arrangements, indeed, a training board can in effect compensate an employer for providing more and better training than is necessary to meet his own requirements. Thus, while we would insist that detailed programmes must be developed by the firm *itself* (assisted as necessary by its training board), we are equally prepared to insist that certain broad principles should be adhered to by firms in drawing up training programmes, and that a certain range of training, practical experience and education should be common to all programmes for a given category of trainee.

11. For convenience, we will frequently use a masculine pronoun when referring to the office worker. What we have to say will, however, generally be equally applicable to both sexes.

## Surveys and Consultation

12. In reaching our conclusions (which are detailed in Chapters IV to IX), we have had the advantage of examining information obtained from several surveys of commercial and clerical training. We have, on our own account, carried out surveys of training arrangements both in a selection of larger firms and in a large sample representative of medium-sized establishments. We outline the results of the latter survey in Chapter II. We would only say here how grateful we are to the many firms which co-operated in these surveys, and to the employment exchange managers and youth employment officers who did much of the hard work.

13. We have, secondly, considered a report on the training of commercial apprentices in three other European Countries which was prepared by several of our members following a fortnight's study tour in these countries. We discuss some of the points of special interest and significance in their report in Chapter III.

14. We have also had the advantage of examining the results of two local surveys undertaken by the Colleges of Further Education in Reading and Redditch, respectively. These helped us to determine the extent and nature of the, at present, unsatisfied training and education needs of young office staff.

15. We are grateful for the many helpful observations which we received from a number of the professional bodies in the commercial field, whom we consulted in the preparation of our report. We have also benefited substantially from the experience which the Association of British Chambers of Commerce have gained in administering their Commercial Apprenticeship Schemes, in England and Scotland, during the past eight years. We are glad to acknowledge the pioneering role played by the Association, and the extent to which our recommendations regarding the training of professional and administrative trainees are founded upon the Association's Schemes.

## *Survey of Training for Commercial and Clerical Operations*

16. The Committee considered it an essential part of its task, and a necessary preliminary to its recommendations, to obtain information about the extent and nature of existing training schemes from a fair number of industrial and commercial undertakings. We also wanted to find out what were quantitatively the most important categories of junior office staff and the qualifications that firms looked for in appointing young people in these categories.

17. We carried out a questionnaire survey to provide ourselves with this information. The survey was in two parts: first, a pilot exercise among (mainly) substantial firms which were known or thought to have well developed training schemes for junior office staff. We included within the scope of the pilot survey, however, a number of establishments selected, on a random sampling basis, from the registers of employers held at two employment exchanges. The main purpose of the pilot survey was to test the usefulness and wording of the questionnaire before we embarked on the main part of the survey. Altogether some 65 firms—74 per cent of those approached—completed and returned their questionnaires. In the light of the information they yielded—and the ambiguities and deficiencies they revealed—we revised the questionnaire and, in September/October, 1965, extended the survey to a much larger and more representative sample of employers. (A copy of the questionnaire used is at Appendix I.) It is on the replies from this larger sample that the information in this Chapter is based.

18. In principle, it would have been desirable to send questionnaires to a sample of employers large enough to be fully representative of all types and size of establishment. But this would have been a very costly undertaking—in time as well as money. We decided, therefore, to confine the survey:

- (a) to establishments employing between 100 and 1,000 people;  
and

- (b) to areas served by 80 of the larger employment exchanges.

We aimed to achieve a sample of about 2,000 establishments by selecting, on a random basis, one in five of those listed on the registers in the 80 exchanges concerned. Such a sample would not,

it is true, allow us to reach statistically valid conclusions concerning all industrial and commercial undertakings; but we hoped it would give us a reasonable picture of the situation in medium-sized establishments. Many of these are likely, however, to face problems similar to those which confront the very small establishment—for example, a relatively small office establishment with few youngsters; and an inability to employ full-time training specialists or to afford lavish training facilities.

19. The procedure adopted for the survey is briefly summarised. Establishments were selected in the employment exchanges. The manager concerned (or, in a number of instances, the youth employment officer) wrote to these establishments enclosing copies of the questionnaire; and he followed up, by telephone or visit, if the employer failed to return the questionnaire or had difficulty in completing it (e.g. unable to give figures for the establishment approached, but only for a group of establishments). Completed questionnaires were returned to Ministry of Labour Headquarters and the information was then coded, transferred to punched cards, and analysed statistically.

20. The questionnaire was in two parts. From Part I—which all establishments were asked to complete—we obtained information about the size of the establishment and the total number of office staff employed; the number of younger office staff (that is, those under twenty-one) in different types of employment; and the number of younger staff who were undergoing day release to attend a course of further education. Part II of the questionnaire provided information about the main features of training schemes for younger office staff. This Part was, of course, completed only by those firms which had one or more such training schemes.

21. Of the 2,021 *establishments* approached, 1,671<sup>1</sup> returned useable Part I forms—a response rate of a little over 80 per cent, which was very encouraging indeed. A substantial majority of the establishments employed fewer than 250 people; over three-quarters had less than 100 office staff. Every industry group was represented, among the most prominently the distributive trades (241 establishments); engineering (159); miscellaneous services (158); construction (132); and transport and communications (117).

22. As table 2 shows, 26,156 office staff under the age of twenty-one were employed in establishments completing questionnaires. Allowing for differences in terminology, it was evident that most

<sup>1</sup> In addition fifteen firms returned Part I forms in respect of ALL their establishments; no reference has been made to this information in this chapter.



of these employees fell into one or other of the following categories :

- (a) secretaries;
- (b) typists and clerk typists;
- (c) machine operators;
- (d) cashiers;
- (e) clerks and office juniors;
- (f) professional trainees.

As expected, the clerks formed by far the largest group, both among males and females, and accounted for 60 per cent of all younger office staff. Within this group are included not only those engaged on general, or unspecified, clerical duties, but also a considerable number of specialists: bank clerks, building society clerks, ledger control clerks, wages clerks, filing clerks and so on. It must be expected that so large a category almost certainly conceals important differences in the quality and potential of staff, in type and responsibility of job, and in academic and other qualifications required by firms. We shall consider, later in this chapter, some of these differences as they are reflected in the training schemes provided for clerks. We were forced to conclude however that it would have been impracticable to distinguish the differences by reference to job titles alone; and that therefore any further breakdown of the category into different types of job would be unprofitable.

23. We were interested to find how many young women (more than one per establishment) were machine operators; and how few were secretaries. The latter is no doubt because few girls are considered sufficiently mature and experienced to be appointed to secretarial posts before they are twenty-one. It is probable that those described by employers as private secretaries (they numbered 349) were for the most part junior secretaries.

TABLE 2  
TOTAL NUMBER OF OFFICE STAFF UNDER 21 YEARS OF AGE  
BY CATEGORY OF EMPLOYEE AND SEX

Sex	Category of employee							Total all employees
	Private secretaries	Typists and clerk typists	Machine operators	Cashiers	Clerks	Professional trainees	Others	
Males ...	2	51	107	25	5,098	381	127	5,791
Females ...	347	6,157	2,555	192	10,449	127	538	20,365
Total ...	349	6,208	2,662	217	15,547	508	665	26,156

## FURTHER EDUCATION FOR YOUNGER OFFICE STAFF

24. We thought it would be instructive to find out whether, regardless of the existence or lack of a formal training scheme in a firm, employers were prepared to release their younger office staff to attend courses of further education during normal working hours. The answers to the questions we asked are analysed in Table 2 of Appendix II. They are not very reassuring. Of the 26,156 young people covered by the survey, 1,850 (7.1 per cent) were attending courses of further education on a day release or block release basis. There was very considerable variation between different industries and between different types of employee in the proportions of young people permitted to attend a course of further education. For example, only 1.9 per cent of young people in the distributive trades were getting day release, as compared with 25.4 per cent in the gas, electricity and water supply industries, and 25.9 per cent in public administration. Similarly, 2.3 per cent of cashiers and machine operators were attending further education courses, as against 14.9 per cent of secretaries and 31.1 per cent of professional trainees. Whilst it would be unwise to lend too much significance to the relative 'performance' of an industry (since the sample of establishments was in some cases very small) the differences do suggest that a very much larger number of young people would benefit, both personally and vocationally, if they were given the opportunity to attend an appropriate course of further education. We shall return to this theme in subsequent chapters. Meanwhile, we turn to the evidence the survey provided about the main features of training schemes for younger office staff.

### Training Schemes for Younger Office Staff

25. As we have said, Part II of the questionnaire elicited information about training schemes for the under twenty-ones—though not every scheme necessarily ruled out a trainee over this age. The questionnaire asked firms for information about the type of employee for whom the scheme was intended; the qualifications required for entry to training; the numbers under training; the length of training; and the main features of the training scheme.

Firms were also asked to say whether they made any provision for training the supervisors responsible for trainees' day to day work.

26. We judged a firm's training arrangements to constitute a 'training scheme' if they included one or more of the following features:

- (a) an induction programme;
- (b) a period or periods of formal training away from the trainee's normal work place;
- (c) planned rotation between different departments or offices;
- (d) a planned syllabus.

These criteria were derived as a result of informal discussions with a number of larger firms, and in the light of the pilot survey. In the event, 209 establishments (that is about one establishment in eight) completed Part II forms, a minority of them giving information about more than one training scheme. In all, we analysed 291 schemes. In the remainder of this chapter we summarise, as briefly as we can, the main conclusions which emerged from the returns made by these establishments. A more detailed analysis of the statistical information on which our conclusions are based is provided in the tables in Appendix II.

### **Training Schemes, Size of Establishment and Industry**

27. As we expected, the larger establishments were much more likely to have a training scheme than the smaller ones. One hundred and three out of 327 establishments employing 100 or more office staff had training schemes, as compared with 106 out of 1,290 establishments employing fewer than 100 office staff. Less than five per cent of the smallest establishments (under 25 office staff) had training schemes, as compared with 50 per cent of the largest (over 250 office staff). While this is no doubt an indication of the tendency in larger organisations to formalise training practices, it also shows how much assistance and expert advice the smaller firm will need if it is to play its full part in providing systematic training.

28. The percentage of establishments in each industrial group which had training schemes also varied considerably, from 50 in mining and quarrying to nothing in agriculture, shipbuilding and leather goods manufacture. The chemical, metal manufacture, and bricks and pottery industries compared favourably with others in the manufacturing group; while gas, electricity and water

supply; insurance, banking and finance; and public administration led the way among the other industries. It was noteworthy that in five industries establishments were both more likely to give day release to their office employees *and* to provide formal training: mining; metal manufacture; metal goods; gas, electricity and water supply; and public administration. In six other industries the opposite situation obtained: food, drink and tobacco; shipbuilding; leather goods; clothing; timber; and printing. It is fair to add, however, that the average size of establishment appears in part to explain these differences; and that the number of establishments was not always large enough to justify firm conclusions about an industry's training effort.

### Number of Training Schemes and Trainees

29. The range of different types of training scheme naturally reflected the range of jobs in which younger staff were employed. The categories of trainees corresponded more or less precisely with the six main groups of employees. The number of schemes and trainees, however, did not invariably reflect the number of employees. For example, 104 training schemes were for professional trainees; 95 for the vastly more numerous clerks. The great majority of both schemes and trainees were within these two categories. A long way behind came schemes for machine operators (29), typists (19), and secretaries (4). A similar picture emerges if one compares the number of *trainees* in each category. No fewer than 751 trainees were professional trainees; trainee machine operators, typists and secretaries, on the other hand, numbered together only 217. These differences may reasonably be attributed to the fact that training for the latter three groups of employees is generally provided either in technical colleges, private colleges or by office machine manufacturers. Only the very large organisation, it would seem, feels called upon to compete in these fields.

30. The total number of younger office staff under training at the time of the survey was 2,116, or 8.1<sup>2</sup> per cent of all younger employees. The proportion of trainees to employees differed greatly between one category and another, and according to the size of establishment. For example 5.5 per cent of the 15,547 clerks were under training as compared with 8 per cent of secretaries and cashiers, 3 per cent of machine operators and 1.8 per

<sup>2</sup> This figure is a good deal higher than that obtained from the 1965 Occupational Survey carried out in manufacturing industries by the Ministry of Labour. This is mainly because the occupational survey covered trainees and employees of all ages, and not just young people.

cent of typists. It is only the relatively large number of professional trainees which brings the proportion of trainees to employees up above 8 per cent. Curiously, the returns showed more young people being trained under professional trainee schemes than were classified as professional trainees. There seem to have been two reasons for this discrepancy. Not all firms distinguished clearly the numbers under training who were under twenty-one from those who were twenty-one or more. Moreover, probably some of those being trained as professional trainees were included in the clerical category of employment.

31. In the largest establishments (with over 250 office staff) trainees constituted 11.5 per cent of younger office staff, showing once again that the smaller establishment provides relatively fewer training opportunities.

### **Main Features of Training Schemes**

32. Before we discuss the pattern of training schemes for each type of office employee, we think it worth drawing attention to those features which appeared, in the evidence of the survey, to be largely common to all types of training scheme. If no account is taken of the unclassified schemes, we found, for example, that 71 per cent of training schemes provided for an induction programme; and 72 per cent included some form of job rotation. In 75 per cent of cases, an official of the firm concerned had been appointed to supervise and organise the training of junior office staff; and 84 per cent of schemes provided for regular reports on trainees. Moreover, 181 schemes out of 259 (about 69 per cent) afforded trainees the opportunity of day release or block release to attend a course of further education. On this evidence, there was a large measure of agreement among different employers about the importance of these aspects or features of training. On the other hand, only 51 per cent of schemes included a planned syllabus; and only 41 per cent involved a period of off-the-job training. Twenty-eight per cent of firms awarded a certificate on satisfactory completion of training. Perhaps more serious, however, was the fact that less than one-quarter of firms having training schemes made special provision for the training of supervisors who had responsibility for the day to day work of trainees.

#### **(i) SECRETARIES**

33. There were only four schemes for secretaries. In each case the training period lasted a year or more, and generally those recruited were expected to have GCE/SCE 'O' level qualifica-

tions. Under three of the schemes secretarial trainees were released one day a week to attend a course of further education leading to Royal Society of Arts or London Chamber of Commerce examinations. On the other hand, only one of the four schemes involved job rotation, one included a planned syllabus, and one an induction programme. Only one scheme provided for off-the-job training. On the face of it, therefore, trainees in these firms are expected to acquire or reinforce their skills through college study, and do not receive a great deal of support from formal training arrangements in their establishments.

#### (ii) TYPISTS AND CLERK TYPISTS

34. The majority of the 19 schemes for typists required no academic qualifications and only a few insisted on aptitude tests or 'O' level English. Training lasted, typically, between one and two years, and included a period of off-the-job training. Ten schemes made some provision for further education, in most cases to study for RSA or similar examinations in typing. There was usually an official in charge of training, and the majority of schemes included an induction programme, a planned syllabus and reports on trainees' progress.

#### (iii) MACHINE OPERATORS

35. Most of the schemes in this group (there were 29) were directed to training young women on either accounting, calculating, or punch machines. Twenty-six schemes set no special academic standard for entry to training, and only a minority had any age limits. Seventeen of the schemes included a period of off-the-job training. Typically, this full-time instruction lasted between two and four weeks. Almost half the schemes (12) involved release for further education, and the course followed showed a wide variation from firm to firm (including courses leading to the Certificate in Office Studies, and to City and Guilds and RSA examinations). Job rotation was not usually a part of the training, although an induction programme featured in 15 schemes. It seems clear that the main emphasis in these schemes was on a short course of off-the-job training followed by a period of experience on the job (most commonly of between six months and two years) consolidating and developing the skill acquired on the full-time course. In most establishments a regular check appeared to be kept on trainees' progress whilst under training.

#### (iv) CASHIERS

36. Six of the eight training schemes for cashiers were in small establishments in the distribution industry; these schemes might

therefore be expected to have a number of common features. Generally, this was found to be the case. Most of the firms confined their recruitment to girl school-leavers who passed a general education test, though in four cases some GCE/SCE 'O' level qualifications were also required. In only a minority of establishments was there off-the-job training or a planned syllabus. For the most part, training consisted of an induction programme followed by a period of between one and two years' supervised experience on the job (with some job rotation to widen the trainee's experience). Further education was an integral part of training in six of the eight establishments; the courses attended as often as not covered aspects of distribution rather than office studies.

#### (v) CLERKS

37. The training schemes for clerks, unlike those for any other category, were divided into schemes to which only males were recruited (29); schemes limited to females (15); and schemes which were open to both males and females (51). About two-thirds of trainees were within the scope of the 'open' schemes. We examined each group of schemes separately in order to determine to what extent, and in what ways, the training provided for girls differed from that for boys.

38. So far as academic qualifications for entry to training were concerned, the training schemes for males and the 'open' schemes set a slightly higher standard than the 'female only' schemes; that is to say, the latter required GCE/SCE 'O' level qualifications less frequently than the former. Another difference between the three groups was in their further education provision. In 23 out of 29 'male only' schemes (and in 36 out of 51 'open' schemes) trainees were released to attend a course of further education, but in only five out of the 15 'female-only' schemes were girls given this opportunity. Moreover, the courses most commonly followed by trainees in the 'male-only' and 'open' schemes were those leading to the Ordinary National Certificate<sup>3</sup> or Senior Commercial Certificate<sup>4</sup> and to the examinations of professional bodies. Those enrolled in 'female-only' schemes concentrated usually on obtaining either Royal Society of Arts qualifications, the Certificate in Office Studies, Scottish COS, or further GCE/SCE subject-passes. It appeared that few girls in these schemes embarked upon the higher level courses.

<sup>3</sup> Here, and elsewhere in this Report, where we refer to the ONC/D and HNC/D we mean the National Certificates or Diplomas in *Business Studies*.

<sup>4</sup> Now called the Scottish National Certificate.

39. In one other respect we found a significant difference between the three groups: length of period of training. Almost three-quarters of the schemes open or confined to boys involved a period of training lasting more than a year and in a number of cases the training period was more than three years. About half (seven out of 15) the female-only schemes, on the other hand, involved less than a year's training.

40. The schemes open or limited to boys therefore usually involved a longer period of training, study for more demanding examinations, and higher academic qualifications for entry to training. These differences almost certainly reflected differences in the anticipated career pattern of young men and women. It seemed that many employers give to male clerical trainees a training which is in many ways appropriate for professional trainees. They use their clerical schemes, in effect, as a preparation for professional qualifications, and possibly junior management, as well as for clerical posts.

#### (vi) PROFESSIONAL TRAINEES

41. The largest number of training schemes was for professional trainees—a reflection of the greater attention that industry and commerce have given to this important group. In most cases entrants to these schemes were expected to have passed at least four subjects at GCE/SCE 'O' level: few trainees were therefore under 16 years of age on entry. A majority of schemes provided for four years' training or more; only a handful had less than two years' training. The bulk of schemes provided for induction programmes; planned rotation; an official in charge of training; and regular reports on trainees. All but 18 firms (out of 104) released trainees to attend a course of further education, though a substantial number expected trainees to attend evening courses as well as day courses. Most trainees studied for professional examinations (82 schemes); of the remainder, some attended courses leading to the HNC/ACC<sup>5</sup>; and others courses leading to the ONC/SCC. Block release was given in eight establishments, and sandwich courses were arranged in 16 others.

#### Summary and General Conclusions

42. Perhaps the most significant facts to emerge are the small numbers of young people under training, and undergoing a course of further education. Just over 8 per cent of the under-twenty-one age group were being trained under formal training schemes; about 7 per cent were getting day release. These figures

<sup>5</sup> Now called the Scottish Advanced National Certificate.



are disappointingly low. Since we know from the survey that the great majority of training schemes involve a period of training lasting at least a year (and in over half the schemes the period was more than two years), it might be reasonable to expect that among the office population within the age-range 15 to 20 at least one-fifth would be undergoing training at any time. On the face of it, therefore, in numbers of trainees we are not much more than one-third of the way towards even a moderate training target. The same point can be made in another way. Even among the largest establishments covered by the survey only half had formal training schemes. Whilst there is no doubt that a good deal of training of an informal kind goes on in other establishments, it is difficult to believe that arrangements which failed to satisfy the not-very-demanding criteria we established could often ensure a satisfactory standard of training. Finally, if in some industries as many as a quarter of younger office employees are receiving appropriate further education, there is no reason why a similar proportion of employees in other industries would not benefit from the same opportunity.

43. There is, however, at least one encouraging fact revealed by the survey. Some 108 training schemes (37 per cent) appear to have been established within the last three years. This suggests that more and more of the medium sized employers are becoming aware of the need to provide more systematic training.

44. A statistical survey of this kind may reveal the existence (or lack) of certain important features in a firm's training arrangements; it cannot give any impression of the effectiveness or quality of training. Doubtless there are firms which have good 'paper' schemes but a poor training record. In all firms, training is likely to depend to a greater or lesser degree on the trainee's supervisor or head of department. On the evidence of the survey, however, the training of these key people receives scant attention in most firms. It is perhaps at this point that the greatest improvement is required in the next few years.

## CHAPTER III

### *Commercial Training in Other European Countries*

45. In most other West European countries, the content and pattern of training for younger office employees—or potential employees—is to a considerable extent determined by the central training authorities. Control of commercial training is achieved either through legislation governing apprenticeship or by the Government itself assuming responsibility for providing training in the state schools. In either case, nationally recognised examinations, which trainees are required to take on completion of training, serve also to encourage a reasonable standard of training. It seemed to us that the experience these countries had gained ought to be of considerable value to the industrial training boards, on whom will fall the responsibility for seeing that commercial and clerical training in Britain is effectively organised. We therefore examined the regulations governing commercial training in a number of European countries. We also considered reports on commercial training in some of these countries prepared for us by the Labour Attachés there. In addition, a small group of members of the Committee visited France, Germany and Denmark in order to see something at first hand of how in practice their training arrangements work out. The report which this group submitted to us is at Appendix III. We do not propose here to go over all of the ground covered in that report, but we think it right to draw attention to what seemed to us the most significant points.

46. There are two main, and sharply contrasted, approaches to commercial training in the countries whose systems we considered. On the one hand, there are those countries where the great bulk of training of young people for commercial and clerical work is carried out in schools and colleges as, in effect, an extension of full-time education. On the other, there are a number of countries that have relied upon, and developed, the traditional apprenticeship system under which the greater part of training takes place in industrial and commercial establishments. France, Italy and Belgium are representative of the first group; Germany, Switzerland, Denmark and Norway of the second. There are, it is true, some commercial apprentices indentured to employers in France; but they are a small, and decreasing, minority; and the whole effort of the French authorities is directed towards the

expansion of full-time vocational training establishments (either in firms, within the state education system, or through private schools). Conversely, in Germany a proportion of the abler young men and women stay on in full-time education in order to obtain advanced commercial qualifications; nonetheless the apprenticeship statistics indicate clearly that the great majority of younger school-leavers who embark on a career in the commercial field are apprenticed to an employer, and are trained mainly on the job (though the training is supplemented by day release). In this respect, the position in Britain is more nearly comparable with that in Germany and other similar countries, even though considerable numbers of young women receive full-time training in typing, shorthand and other commercial subjects, in colleges of further education or in private colleges, before entering industry. Britain shares with Germany the tradition that training is primarily the responsibility of the employer; and this is certainly the premise on which the Industrial Training Act is founded. Much of our attention has therefore been focussed on the arrangements for commercial training in countries like Germany and Denmark which have an industry-based system; and in this chapter we shall be particularly concerned with the way in which these countries ensure that the employer discharges his training responsibility adequately.

### **Training Regulations**

47. In Germany and Denmark the training given to office apprentices is controlled by regulations which have the force of law. These regulations describe in some detail the subjects and functions in which the trainee should receive instruction; and an employer who enters into an apprenticeship contract is legally obliged to provide training in accordance with the specification laid down. Training may not therefore be restricted unduly by the special requirements or circumstances of the employer's business. The regulations are drawn up by the appropriate national employers' and trade union organisations, and are then formally ratified by the central training authority and the Government. The regulations, once ratified, constitute a national standard of training for the occupation concerned.

48. We were interested to note that whilst, in Germany, there are a number of regulations for different types of office calling—the most significant are those applying to insurance clerks, bank clerks, industrial clerks, wholesale and export clerks, shipping clerks and general clerks—in Denmark one single statutory

order covers the training of all office apprentices, in whatever industry. We gathered that the German authorities are now inclined to the view that the division of office training specifications into a number of categories corresponding roughly with a particular type of firm or office was a mistake. They feel that a broader-based training programme, such as that laid down about four years ago for the general clerk ('Bürokaufmann'), will prove a more satisfactory basis for commercial training in the future. We found it instructive, therefore, to compare the training regulation for the German 'general clerk' with the equivalent Danish one for 'office apprentice' (translations of which are included in the annexes to Appendix III), both of which correspond roughly to what in Britain would probably be called simply 'clerk'. (It should not be supposed that the German and Danish regulations cater only for a smallish group of office staff with relatively good academic qualifications.) Although the German specification is somewhat more detailed in its outline of the subjects to be covered during the course of the three year training period, in general there appears to be a marked similarity between the training laid down for the German and Danish apprentice. In both cases, there is an insistence that the apprentice should have instruction and practical experience in such things as: filing systems and registry work; sorting, distributing and forwarding mail; typewriting; correspondence; machine calculations and commercial arithmetic; simple book-keeping and accounting; stock control and store keeping; and the use of normal office machines. The aim of training is very much the same: the apprentice should have the opportunity of carrying out the whole range of basic clerical operations in a normal office, and should acquire a reasonable understanding of the most important commercial functions carried out in the firm and in the industry. In the words of the German regulation, the office clerk must become 'thoroughly familiar with office practice and office procedures in use at the time'; while the Danish regulation requires the employer to give his apprentice the opportunity of 'carrying out all work appropriate to the offices of the undertaking'.

49. It was clear from an examination of these training regulations that both the German and Danish authorities are most concerned to ensure that the office apprentice has a broad introduction to commercial employment, whatever job he or she is ultimately to be employed in. There are two main reasons for this. First, there is the belief that only a broad-based training will ensure

that the apprentice is sufficiently adaptable to move from office to office, and from job to job, as may be required. Secondly, it is thought that the apprentice should be able ultimately to advance to more responsible positions if he has the right qualities, and the training given him should be based on the expectation that he will in time do so. In neither country, therefore, are there training specifications for such occupations as copy typist, shorthand typist, office machine operator, etc., which are regarded as too narrow a preparation for the world of commerce. However, the regulation governing the training of apprentices in Denmark permits the employer, if he so wishes, to bias the training given in the direction either of shorthand typing and secretarial work or book-keeping, provided always that the apprentice is not thereby denied experience of the other operations mentioned in paragraph 48 above.

### **Further Education**

50. Although the main responsibility for providing adequate training for younger office staff in Germany and Denmark rests with the employer, the commercial or trade school also has an important role. In both countries it is a legal requirement that the boy or girl who enters an apprenticeship should undergo continued part-time education until reaching the age of 18. Further education is, therefore, an essential part of commercial training, whatever the occupation or level of ability of the trainee. All apprentices attend the trade or commercial school one full day (or the equivalent) each week. The course at the school is, like the training programme in the firm, based on the syllabus laid down in the training regulation. The educational course (which frequently has a strong practical bias) combines with the training and experience in the firm to prepare apprentices for the final examination which all are required to take at the end of the period of apprenticeship. In this way, it seems that in both countries there is a closer integration of educational and training programmes, and perhaps a more satisfactory marriage of vocational and educational objectives, than is generally achieved in Britain (though doubtless the vocational schools have the same problems of keeping the educational programme in step with the training given in a large number of different establishments).

### **Supervision of Training in the Employer's Establishment**

51. It may be questioned whether, even with the best regulations in the world—and with the spur provided by compulsory end-of-training examinations—training in a firm can be fully satis-

factory unless there is some regular check on employers to make sure that they are following the training regulations and that the firm is capable of giving a good standard of training. Moreover, the regulations cannot, in themselves, lay down a very detailed training programme; if they attempted to do so, they would be impossibly restrictive. The employer, therefore, has to draw up a training programme embodying, so to speak, the broad principles enshrined in the regulations. And many need a good deal of help to do this. The Germans are very much aware of this problem, and it is the responsibility of the local chambers of industry and commerce to help individual employers to keep up to the mark (there are no similar agencies in Denmark). The chambers of commerce—or certainly the more energetic ones—carry out this responsibility in a number of different ways.

52. First of all, the chambers require employers to register all apprenticeship contracts. In the ordinary way, an apprenticeship contract will not be accepted by the chamber of commerce unless the employer is known to be able to provide a reasonable standard of training. If necessary, officials of the chamber will visit the employer's establishment to find out whether the employer is likely to be able to meet his training obligations. These officials will also give the employer advice and assistance in planning the training programme for the apprentice. Secondly, the chamber will insist that the employer nominate a senior member of the firm to be specially responsible for the training of apprentices; and it is expected that this official should undergo a special training course, or series of seminars, organised by the chamber. Finally the chamber requires all apprentices to keep journals or notebooks, which are periodically inspected both by the firm's training officer and by officials of the chamber of commerce. These journals seem to have three main purposes. They provide a record of the training the apprentice receives. They develop the trainee's ability to write clearly. And they give the firm's trainer a means of measuring the apprentice's progress.

53. It seems to us that the chamber's inspection and advisory service, together with the appointment of a senior member of the training firm to be responsible for the apprentice's progress, and the keeping of a journal by the apprentice, are probably just as essential to the improvement of training in the employer's establishment as the training and examination programmes.

### **The Danish Introductory Course for Office Apprentices**

54. If the striking feature of the German system is the control of standards exercised by local chambers of commerce (it is fair

to point out that not all chambers are sufficiently well staffed to do full justice to their responsibilities) the most notable feature of Danish practice is the recent institution of an introductory course for all commercial apprentices. The aim of this course is to establish a sound practical foundation for subsequent training in the employer's establishment—to give the apprentice a 'flying start'. The Danes have come to the conclusion that there are certain important skills and knowledge which the apprentice must acquire as early as possible in his apprenticeship if he is to benefit to the full from his office experience. They do not believe the average employer has the staff or time or facilities to teach these basic skills systematically; and they have therefore decided that the introductory course should be provided in the commercial schools rather than in firms (though the employer will meet part of the cost as well as paying his apprentices' wages).

55. The introductory course consists of 240 hours' instruction spread over ten weeks. The syllabus has a marked practical bias, particular emphasis being given to typing (12 hours instruction per week); and to the use of the telephone, adding and calculating machines, and photocopying and duplicating equipment. Apprentices also receive instruction in basic office systems and procedures. The balance of the syllabus is made up of four periods of either English or German. Although the Danes regard the course as still in an experimental stage—and some quite formidable organisational problems have yet to be surmounted—they are satisfied that a course on these lines is needed to support the traditional structure of apprenticeship coupled with day release. We shall consider in Chapter VI the case for a similar approach to training clerks in Britain.

## Conclusions

56. It is perhaps easy to exaggerate the advantages secured by Germany's and Denmark's more systematic approach to industry-based training. Certainly the authorities in both countries are critical of some aspects of commercial training, and opinion seems to be moving in favour of more full-time training in special schools to supplement training on the job. There is some dissatisfaction with the way responsibility for further education is separated from responsibility for training. In Germany some trade specifications are considered by many to be too rigid and too narrowly conceived. In Denmark controls over the standard of training in an employer's establishment are very loose and

informal. Nonetheless, we believe that in three important principles these countries have established a sound basis for further development of commercial training. The first of these is the principle that an employer taking on a young person has a duty to provide a reasonable standard of instruction and a fairly broad introduction to business. Secondly, an essential part of this instruction is further general and commercial education. And, thirdly, the existence of certain controls makes it probable that the trainee will attain a minimum level of competence. These, it seems to us, are the main lessons for Britain.



## ***A Structure for Commercial and Clerical Training***

57. The results of our surveys of commercial training in this country and in other European countries have convinced us that, whatever the type or level of younger office staff, there are certain essential features which any training scheme should contain. These features or elements together constitute what we might term the structure of commercial training, as we should like to see it developed in this country. We believe that if firms and training boards adopt the approach we outline in this Chapter, their training schemes will be soundly based. Moreover, we consider that the structure proposed is sufficiently flexible to permit an employer to modify his training arrangements wherever, and whenever, they appear no longer to meet the firm's requirements. Finally, it will be evident from what follows that we place the main responsibility where it ought to be—with management. Commercial training cannot satisfactorily be left entirely to technical colleges and other external agencies, however valuable their contribution may be.

58. The features, which we should like to see incorporated in all training schemes for young office employees, are:

- (1) the nomination of a senior member of management to be responsible for commercial training in the firm;
- (2) a planned programme based on an analysis of the knowledge, skill and experience required in the trained employee;
- (3) an induction programme;
- (4) instruction and practice in basic skills, office systems and procedures;
- (5) competent supervision;
- (6) further education.

In this chapter we discuss what each of these generally involves. In subsequent chapters we consider the special requirements of the four main categories of younger office employees: professional and administrative trainees; clerks; office machine operators; and typists and junior secretaries.

### **(1). Responsibility for Training of Office Staff**

59. We believe it essential that all firms should allocate to a senior member of management general responsibility for the training of

office staff. Even those firms which have their own education and training officer should recognise that training policy cannot satisfactorily be devolved on to the training department. The training officer will be able to provide expert assistance and advice in planning and implementing training programmes; formal responsibility for office training should, however, normally lie with a senior manager answerable directly to the board of directors or head of the firm for the adequacy of training arrangements. In the smaller firm, there will probably be no full-time training specialists, so that there will not be the same temptation to 'pass the buck' to the training officer: the temptation is rather to leave it to departmental managers and supervisors to get on with the job, and to provide no check on the adequacy of training.

60. Responsibility for the training of office staff will involve:

- (a) identifying training needs and assisting in drawing up suitable training programmes;
- (b) ensuring that these programmes are adhered to, and that the training is satisfactorily carried out;
- (c) advising trainees on further education opportunities and maintaining close contacts with the local college(s);
- (d) seeing that regular reports on trainees are prepared by the appropriate departments, and that adequate records of trainees' progress maintained; and
- (e) assisting in the selection and recruitment of trainees.

In the larger firm, many of these tasks will be undertaken by full-time training staff, or with their assistance. In the smaller firm they may fall to heads of departments concerned. Whatever the circumstances, however, the manager having general oversight of office training should be ultimately responsible for seeing that each of these tasks is properly discharged.

61. Where the firm or establishment cannot easily or frequently call upon the assistance of a training officer, the functions described in the preceding paragraph will certainly require the responsible manager to have a reasonable appreciation of training problems and techniques. Even in the larger undertaking, moreover, the training officer may well have had little experience of commercial, as opposed to technical, training. In either case, therefore, a special training course is called for.

62. The British Association for Commercial and Industrial Education (BACIE) have recently instituted regular five-day residential courses (entitled 'Background to Training for the Office'—see

Appendix IV) which are intended for training officers and managers in commercial departments who have responsibility for the training of office staff. These courses concentrate on: the identification of training needs of clerical workers; training methods and the organisation of training; and background information about developments affecting work and training in the office. We hope that employers will take full advantage of these, and similar, courses; and that the training boards will bear in mind the value of courses of this kind in working out their grant schemes.

## **(2). A Planned Programme**

63. We have eschewed any attempt to lay down a model programme of training for any category of employee. It is essential that firms should draw up programmes of their own. These programmes should be in sufficient detail to ensure that the training is thorough; and they should be committed to paper and made known, and available, to the trainee and his supervisor (and also on request, to the industrial training board). A programme should indicate the functions and tasks in which the trainee should gain experience, the order in which they are to be covered, the methods or type of training, and the (approximate) time to be devoted to each stage. It may provide for films, programmed instruction, discussions, visits or projects to supplement on-the-job experience. It should make clear who is responsible for each stage of the training; and in which office the trainee is employed. In order to give some assistance to firms in drawing up suitable programmes, we include in Appendix V examples of several schemes which have come to our notice during the course of our enquiries, and which we believe to be soundly conceived. We would, however, emphasise that it is fundamental to the value and effectiveness of training, both for the firm and the trainee, that the programme followed should not be simply a copy of what another firm does. It must be derived from careful consideration of the kind and range of work in which the trainee will have to become proficient; the career he can anticipate in the firm; and the knowledge and experience which are therefore essential.

## **(3). An Induction Programme**

64. By induction we mean those measures which are needed to familiarise the new worker with the firm and with the department and office in which he is to be employed. The induction programme should help the newcomer to feel at home in the firm, to

know what he can expect of the firm, and what it will expect of him. Its importance—particularly where the newcomer has no, or little, industrial experience—lies in the fact that it gives the trainee the initial confidence and motivation which are an essential condition for effective training.

65. In the larger firms, induction will normally take the form of a special course which clerical trainees (perhaps together with other newly appointed employees) take on—or soon after—arrival and before allocation to a particular department. The smaller firm, with insufficient recruits to justify the establishment of a formal induction course, will generally find it necessary to organise a programme on a more-or-less *ad hoc* and informal basis as need arises. In either case, however, the programme should cover the following:

- (a) planned reception: meeting the trainee and showing him round the most immediately important sections;
- (b) explanation of terms and conditions of employment and of any relevant disciplinary and general regulations (including safety and health) and information about welfare and social facilities; description of joint negotiating arrangements in the firm;
- (c) information about the firm (and industry)—the products made, history, management, different departments; the trainee should have the opportunity to see as much as possible of the firm's activities, both on the commercial side and, where appropriate, on the production side;
- (d) discussion of training and career prospects, including advice on further education opportunities;
- (e) introduction to the department or office in which the trainee is to work, including an explanation of its main functions and how it is linked with other departments/offices.

66. The way in which the programme is organised will, of course, depend on the circumstances of the firm, but it is always important to see that senior managers and, especially, supervisors are involved as much as possible in carrying out the induction programme. The role of the trainee's supervisor is a vital one, and the supervisor's attitude towards training and the trainee will determine to a large degree the effectiveness of the training given. Everything possible should be done to convince the supervisor of the importance of his part in induction and training.

67. Induction is often regarded as something which takes place only at the outset of a trainee's career in a firm, during the first

few days or weeks. It is certainly necessary for the trainee to be properly received and looked after on arrival; but it is a mistake to assume that induction is complete at the end of the first few days. Certain items should be covered at the beginning; others can perhaps best be left until the trainee has had some experience in the work. Induction should, in fact, be integrated with the overall training programme.

#### **(4) Instruction in Basic Skills**

68. It is generally recognised that a period of initial full-time training in basic skills is essential—or at least highly desirable—in the case of shorthand, typing and office machine operation. Many of these skills cannot easily be taught on the job. On the other hand, it is equally generally supposed that other clerical skills are best acquired through experience of the day-to-day work of the office—often called ‘sitting next to Nellie’. While it may be true that certain of these skills—e.g. filing, proper use of the telephone and other common office machines—can best be taught in a realistic working situation, this should not be allowed to obscure the fact that they ought to be taught systematically and thoroughly. The trainee ought not to be left to pick up the techniques in a hit-and-miss way, as will probably happen if he is left to himself, or under inadequate supervision. Much time—and perhaps also a few tears—will be saved by providing instruction in the essential ‘tools of the trade’ at an early stage of the training. It will, we believe, often be most efficient to give such instruction off-the-job.

#### **(5) Office Supervisors**

69. Whether a firm is small or large, the effectiveness of the training an office worker receives will depend to a considerable degree on the quality of his immediate supervisor: on the supervisor's knowledge of the work, on his ability to instruct, and on his appreciation of his training role. As we have noted in Chapter II, it is plain that the majority of firms do little or nothing to ensure that their supervisors are equipped to do their job properly. We therefore think it essential to consider what the training boards can do to remedy this situation. We do not suggest that the recommendations we make here constitute a full treatment of the subject. But we suggest that they provide the basis for immediate action by boards and firms.

70. In our discussions of the training of office supervisors, we have given a good deal of attention to the approach recommended

in the booklet by the Industrial Training Service recently published by the Central Training Council<sup>1</sup>. This booklet was written with the shop floor foreman mainly in mind, but we believe the principles it outlines are generally valid for office supervisors. The first of these principles is that 'the differences between supervisory jobs are often more striking than their points of similarity': and that therefore supervisory training must be 'job-centred' and based on an analysis of what the job entails. The second principle emphasised is that, while external courses will usually be an essential complement to the training activities of the firm, they should not be a substitute for *company-based* training and development.

71. We feel sure that the first task in establishing a soundly based training scheme for office supervisors is to clarify (by means of a dialogue between manager and supervisor) the role and responsibilities of the supervisor, and in the light of this to determine what knowledge and skills the supervisor needs to acquire to do his job. It will then—but only then—be possible to draw up an appropriate training programme and decide what course or courses are needed.

72. We consider, however, that there are some items which should appear in the training programme of nearly all office supervisors. These may be covered either by direct on-the-job training by the supervisor's manager; by discussions, seminars and formal courses conducted within the company; or by external courses at technical colleges, etc. (for example, courses leading to the Institute of Office Management's Certificate in Office Supervision or to the Certificates of the National Examinations Board in Supervisory Studies). The firm must decide which combination of these methods is most appropriate. We would only stipulate that direct on-the-job training of his supervisors is an important responsibility of the manager and an essential part of supervisory training.

73. We believe that the office supervisor must usually have an understanding of the following:

- (a) the firm's operations, policies and methods, and the extent and limits of the supervisor's responsibilities;
- (b) clerical work measurement and organisation and method techniques: how to set realistic standards for productivity of

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<sup>1</sup> 'Supervisory Training: A New Approach for Management' by J. P. de C. Meade and F. W. Greig of the Industrial Training Service. H.M.S.O. for the Central Training Council, 1966.

the individual and how to ensure the most effective flow of work within the office;

(c) instructional methods: how to induct and train newcomers to the office;

(d) office machinery and equipment (including computers): what mechanical and electronic aids the office can call upon and how they are best deployed;

(e) communications and human relations: what the main problems of leading and controlling a work group are, and how they can be overcome;

(f) job grading, salary structure, and legislation and agreements affecting terms and conditions of employment.

It is, of course, clear from what we have said above that the emphasis to be given to these will vary greatly; and that there are many other subjects in which some supervisors require instruction.

74. We asked ourselves at which point a start might best be made in tackling the problem of the lack of systematic training of office supervisors. Clearly those supervisors already in post have much the most urgent need of training. It seems to us, moreover, that special emphasis should be given to the development of instructional ability. TWI courses in Office Supervision (described in Appendix VI), and other short intensive courses covering methods of instruction, should at least ensure that supervisors have a greater understanding of their training responsibilities; and this is likely to be to the direct benefit of youngsters coming into the office. These courses are not, however, to be regarded as meeting all the supervisor's needs or as a substitute for working out the kind of programme described in paragraphs 71 to 73 above. They should be seen rather as a point of departure for immediate action. Moreover, the needs of potential supervisors should not be overlooked in any long-term policy for supervisor training.

#### **(6) Further Education for Younger Office Staff<sup>a</sup>**

75. In our survey we found that only about 7 per cent of those under the age of 21 were being released to attend a course of further education during normal working hours. This finding confirms what is an already well known and well documented fact that, in general, office staff are expected to pursue their studies in their own time (either by evening classes or through correspondence

<sup>a</sup> Information about further education qualifications and courses is to be found in Appendix VII.

courses). We also found, however, that the majority of training schemes of *each kind* (with the one exception of machine operators' schemes) provided for the release of trainees for appropriate further education. It appears, therefore, as though firms which recognise the advantages of systematic training also appreciate the relevance to that training of further education. Why is this? In what ways is further education important to the training of younger office workers?

76. We believe that one of the most important contributions of further education is to improve the ability to communicate orally and in writing. This ability is central to the clerk's job, and few will rise far unless they are able to speak and write clearly. Secondly, further education can broaden the trainee's understanding of the commercial functions and give him a finer appreciation of the relationship of the different functions to each other and to the activities of the undertaking as a whole. Among other advantages, this may assist him in due course to undertake more responsible work. Thirdly, the college course can give instruction in the theoretical aspects of the trainee's practical work and, possibly, extend its range. Finally, it should be recognised that further education helps the trainee to develop into a more mature person, a more responsible employee, and a more useful member of the community. For each of these reasons, the role of further education in the training of office workers seems to us an essential and integral one.

77. While the responsibility of the trainee to contribute to his own development should not be overlooked, it is clearly unreasonable to require the trainee to give up a great part of his own time to attend a further education course which is an essential part of his training. Release during normal working hours, on a day, block or sandwich basis, should therefore be a part of the training provided by the employer. Quite apart from the justice of this, it is as well to bear in mind that evening and correspondence study—though both may have a place when properly integrated into a well balanced training scheme—make heavy demands on the physical and mental stamina of the trainee, and frequently result in high failure and drop out rates. For example, one of the professional bodies has recently completed a survey which showed that the results of students taking intermediate professional examinations by day release were consistently and substantially better than those of students who took correspondence courses. The percentage pass rates for those candidates studying by day



release were: 59 per cent for those with exactly four 'O' level passes; 70 per cent for those with five or more 'O' level passes and/or one or two 'Highers'; and 51 per cent for candidates (from both preceding categories) completing Intermediate within two years. The corresponding percentage pass rates for candidates studying by correspondence courses were: 34 per cent; 59 per cent; and 30 per cent, respectively. Whatever the gain in terms of character-development from following evening and correspondence courses—and these are probably exaggerated—the loss in failure of examinations and in discouragement to the trainee is very much greater.

*Training Recommendations: I***PROFESSIONAL AND ADMINISTRATIVE TRAINEES****Aims Of Training**

78. The scheme outlined in this chapter is intended to meet the training needs of those young men and women of higher than average intellectual capacity who are recruited by firms with a view to their filling in due course responsible positions, either in particular commercial departments or in general administration. Trainees of this kind are of key importance to the efficiency of an undertaking as they will constitute the pool from which a substantial proportion of the senior managers of the future will have to be selected. The aim of training should therefore be to develop not only professional knowledge and commercial ability of a specialised kind but also the administrative capacity required in positions of responsibility. The training scheme is intended to provide the trainee with :

- (a) a broad working knowledge of the main commercial functions of a firm, and substantial practical experience in the field(s) in which he is to specialise ; and
- (b) the opportunity to follow associated further education courses in business or professional studies leading to qualifications at the highest level of which he is capable.

79. We should explain that in drawing up the recommendations in this chapter we have depended heavily on the experience of the Commercial Apprenticeship Scheme and on the advice tendered by the various professional bodies whom we consulted. We should also make it clear that these recommendations apply to trainees below graduate level. We propose at a later date to consider the training appropriate for those recruited to commercial departments after graduation.

**ENTRANTS TO TRAINING SCHEME FOR  
PROFESSIONAL AND ADMINISTRATIVE TRAINEES**

80. As the scheme outlined in this chapter is intended primarily for those likely to be capable of achieving professional, or equivalent, status entrants to the scheme must possess at least the minimum qualifications required for entry to the appropriate educational course.

81. Most recruits will come from two main sources : those aged 16 plus who have the required number of passes at GCE or SCE 'O' level ; and those aged 18 plus who have passed one or more subjects at 'A' level<sup>1</sup>. We anticipate that because of:

- (a) the introduction of degree and other advanced sandwich courses in business studies ;
- (b) the increasing tendency for many of the professional bodies to raise their academic requirements for membership ; and
- (c) the desire of the abler student to stay on at school to the age of eighteen,

industry and commerce will have to look more and more to the latter group for their professional and administrative trainees. This does not, however, mean that companies should close the doors to younger people of 16 or 17—or indeed to older employees who may have missed their opportunity on leaving school.

82. The respective minimum qualifications to be looked for from the two groups are :

**(a) at 16 years of age :**

at least four 'O' level passes in the GCE/SCE (or in the Certificate of Secondary Education at Grade I level) including English and three other subjects ;

**(b) at 18 years of age :**

at least one or two 'A' level passes in GCE ; or Ordinary National Certificate (or Diploma) or Scottish National Certificate (or Diploma).

In addition, trainees who have previously obtained a Certificate in Office Studies at the 'credit' level, or the Scottish Certificate in Office Studies with an appropriate Endorsement, or who have secured the necessary 'O' level passes, may be recruited at the age of eighteen if they are judged capable of taking the ONC and higher courses.

## **MAIN FEATURES IN THE TRAINING SCHEME<sup>2</sup>**

### *A. Instruction in the Main Office Procedures and Services*

83. We suggest that the same basic training programme as that recommended for clerks (see Chapter VI) should be followed also by the younger professional and administrative trainees (i.e.

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<sup>1</sup> In the case of Scotland, this would mean a group of SCE Higher passes.

<sup>2</sup> What is said here must be taken together with our recommendations in Chapter IV. We deal here only with provisions peculiar to this type of scheme.

those recruited at 16 plus). In the case of the older, better qualified trainee the emphasis should be placed on **understanding office systems** rather than on **learning basic clerical skills**.

#### *B. Planned Programme of Training and Experience*

84. The trainee should gain experience in **at least three** of the main commercial departments, divisions or functions, special emphasis being given in the **latter stages** of training to the work in which the trainee is expected to specialise. While we do not wish to lay down any hard-and-fast rules regarding the detailed allocation of trainees, we believe it will prove valuable in the long run if most trainees gain some experience of each of the following :

- Office organisation and general administration ;
- Financial accounting ;
- Production and progress control ;
- Sales and marketing ; and
- Purchasing.

#### *C. Special Projects or Assignments*

85. We consider that a part of the training programme—particularly in the latter stages of the training period—should consist of special assignments or projects which require the trainee to examine a particular aspect of the firm's operations, to collect relevant data on the need for improvements in efficiency, and to report on changes which could profitably be made. Such assignments should be as realistic as possible and selected with a view both to producing worthwhile information and to giving the trainee the opportunity to recognise a problem and offer constructive suggestions towards solving it.

#### *D. The Keeping of Work-books or Journals*

86. We *recommend* that professional and administrative trainees should each keep a work-book in which they record (perhaps once a week) the significant features of the work they have been doing and discuss aspects of commerce and business which impress them. The purpose of these exercises will be fourfold: first, to develop the trainee's ability to express himself clearly and logically; second, to encourage him to think about the work he is doing and to develop a constructive approach to it; third, to provide a means by which the training officer and manager responsible for training can see that the trainee is progressing adequately; and, finally, to provide for industrial training board staff a check on the training

given in the firm. It is, of course, essential that work-books are regularly examined—and commented upon—by the manager responsible for training; and we *recommend* that the manager should also from time to time discuss with the trainee, in informal tutorial sessions, any matters on which it is evident from the work-book that the trainee needs guidance.

#### *E. Release for Further Education*

87. Trainees in the scheme should be granted day, block or sandwich release during normal working hours to enable them to pursue at a college of further education the business or professional course relevant to their stage of training.

(i) Education during the first stage of the scheme for the 16-year old

88. For the 16-year old entering the scheme, the choice lies between a course leading to the Ordinary National Certificate (ONC) or Scottish National Certificate (SNC), or one leading to the intermediate examinations of a professional body. In the great majority of cases we suggest that the ONC/SNC courses should be preferred, for a number of reasons. Firstly, it is desirable that all entrants to the scheme should be given a broad basic understanding of business at this early stage. Secondly, for the trainee's own sake he should be advised to defer professional specialisation until the latest possible stage—the 18-year old with two years of broad business education and practical experience behind him is very much better fitted to make a suitable choice than the 16-year old straight from school. Thirdly, a trainee will not normally delay his progress towards a professional qualification by taking the ONC/SNC since these attract subject-for-subject exemption from the intermediate examinations of a wide range of commercial professional bodies. Fourthly, these courses are readily available in all areas of the country; the same is not true—nor in the nature of things can it ever be true—for most first-stage professional courses. It is relevant to add that most of the professional bodies we consulted agreed that early specialisation was generally to be avoided; and all were of the opinion that a broad-based introduction to business was essential for professional trainees. We hope that the acceptance of this proposition will lead to the abandonment by professional bodies of their own preliminary and intermediate examinations in favour of the ONC and SNC. Apart from the reasons mentioned, moreover, this would have the additional advantage of substantial economies in the use of scarce teaching resources.

89. We recognise however that, for the time being, in certain cases it might be appropriate for the 16-year old trainee to take the first stage of a professional course rather than the ONC/SNC. In these cases the firm should make sure not only that a suitable course is available, but that the trainee has the requisite minimum entry qualifications, which may differ from those for the ONC/SNC.

(ii) Education for the 18-year old in the scheme

90. The 18-year olds in the scheme will come from two sources, i.e. those who first entered training at 16, and have successfully completed the first stage of training, including the ONC/SNC (or first professional) course; and those who are entering training for the first time with 'A' level passes, the Ordinary National Diploma (OND) in Business Studies, or the Scottish National Diploma or University Attestation of Fitness.

91. The choice of educational course at this stage will depend on whether the training programme calls for specialised professional studies or for a more general business education. In the former case, the trainee should undertake an appropriate course of study for his chosen professional intermediate (in so far as this is still necessary for those who have the ONC/SNC or Diplomas) and final examinations. These courses will normally be spread over some three or four years of part-time day or block release study.

92. For those who are to undertake more general business studies, three courses are open, depending on the qualifications held at this stage. (These studies can often be coupled with study for professional examinations as well—trainees and their employees can get advice on this from their college of further education):

(a) The Higher National Certificate (HNC) in Business Studies<sup>3</sup>

A two-year part-time course with an entry standard of two appropriate 'A' level passes, or an ONC or OND. The trainee entering this course straight from school with 'A' level passes will in all probability have to take a 'conversion' course beforehand;

(b) The Higher National Diploma (HND) in Business Studies

A three-year sandwich course with an entry standard of at least one 'A' level, or the ONC or OND. No preliminary conversion course will be needed in this case;

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<sup>3</sup> In the case of Scotland, this would be the Scottish Advanced National Certificate in Business Studies.

(c) A degree course in business studies

Four- or five-year sandwich courses leading to a degree of the Council for National Academic Awards. The normal minimum requirement for entrance to a course leading to the Council's degrees, whether honours or ordinary, is a General Certificate of Education either with passes in five subjects, including two appropriate subjects at 'A' level, or with passes in four subjects including three appropriate subjects at 'A' level; or an Ordinary National Certificate or Diploma at a good standard.

It should be noted that any of the qualifications mentioned here (i.e. final professional, HNC, HND, or a degree in business studies) will qualify the holder at a later stage in his career to enter a course leading to the Diploma in Management Studies and other more advanced post graduate qualifications in the field of business management.

(iii) Block release

93. Although release for part-time further education for the ONC and the HNC, and most professional courses, is generally on a day release basis, there are important advantages for trainees in the commercial and professional field in the longer consecutive periods of study that block release courses can provide. In planning training programmes firms should therefore consider carefully whether their trainees might not benefit more from a block release course. Colleges will be ready to consider the possibility of putting on appropriate block release courses where these are not already available.

**Length of Training Period**

94. For the younger trainee, who aims to pass the ONC/SNC before going on to study for a professional examination, the training period will last in all four to five years; but this period should be divided into two parts. The first two years should not involve any marked degree of specialisation. The trainee, during this period, should receive a broad introduction to business and office procedures, and is likely to be engaged for the most part on mainly routine work. At the end of this period a decision will be reached about his future training programme and about whether he is capable of benefiting from the more demanding training and education required to prepare him for a professional qualification. Assuming the trainee has progressed satisfactorily, and has passed ONC/SNC without undue difficulty, his training should continue

for a further three years. If, however, there is some doubt about his potential, it may be decided that his formal training is best concluded at the end of the first two years.

95. For the older trainee, the training should normally last three to four years, during which period he should pass: the HNC or the final examinations of one of the professional bodies (or both); the HND; or an examination qualifying him for a degree in business studies.



*Training Recommendations: 2***CLERKS****Coverage of the Scheme**

96. In this chapter we propose an outline for a training scheme for clerks. It will be as well if we attempted to distinguish at the outset the types of employee for whom the scheme is intended.

97. The 1951 Census tables show two categories of clerks: 'clerks, estimating and accounting'; and 'other clerks'. About 1,700,000 men and women were then employed in these two occupational groups, out of the total of some 2,300,000 office workers. That is to say that a little over 70 per cent of the office work force was composed, in 1951, of people described as clerks as distinct from e.g. secretaries, shorthand and other typists, and office machine operators. By the time of the 1961 Census, the total number of office workers had risen to 3 million of whom some 2,300,000 are categorised as clerks, cashiers and machine operators; and it is reasonable to deduce that over 2,200,000 were clerks or cashiers (again over 70 per cent of the total number of office workers).

98. It is the younger members of this population with whom we are concerned in this chapter. Our Survey showed just over 60 per cent of younger office staff to be within the category of general and specialist clerks and cashiers. The jobs done by these clerks, of course, vary considerably in range and responsibility, but we may reasonably describe the work done by the majority as routine clerical tasks and general office duties of a kind which the Institute of Office Management rates as Grades A-D.<sup>1</sup> Grade A will include

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<sup>1</sup> "Clerical Job Grading and Merit Rating", published by the Institute of Office Management, 1961.

The definition of these four grades are:

*A GRADE*—Tasks which require no previous experience; each individual task is allotted and is either very simple or is closely directed.

*B GRADE*—Tasks which, because of their simplicity, are carried out in accordance with a limited number of well-defined rules after a comparatively short period of training; these tasks are closely directed and checked, and are carried out in a daily routine covered by a short time-table and short period control.

*Continued at bottom of next page*

jobs involving little discretion or judgment (e.g. messenger duties and the simpler forms of sorting) while grade D jobs are typically filled by senior and experienced clerks, and may require a limited degree of initiative and discretion (e.g. shorthand typing of non-routine correspondence). Since we are focussing on young and inexperienced office workers, it is to be expected that most will be doing work below grade D level. We would include within the scope of our proposed scheme, in addition to general duties clerks and office juniors, those who are employed within a specialist section or department (sales, shipping, registry, accounts, cashier etc.) or on particular types of clerical operation (invoicing, filing, book-keeping, etc.). We have in mind those who can be expected to spend the greater part of their career as clerks, senior clerks and section leaders, and office supervisors, though we recognise (and indeed hope) that a proportion will rise to managerial positions. We make no distinction between men and women. We do, however, exclude from the coverage of this scheme those (mainly women) who are to be employed as full-time machine operators, shorthand typists and junior secretaries. Chapters VII and VIII deal with these groups.

### **Aims of Training**

99. The aims of the clerical training scheme are to ensure :

- (a) that clerks are instructed in the most important office procedures, skills and services;
- (b) that they have a thorough understanding of the work of the section(s) in which they are (or are likely) to be employed; and
- (c) that they have a reasonable appreciation of the main commercial functions of the firm.

### **Entry to Clerical Training Scheme**

100. The work done by the clerk calls for competence in English or Arithmetic, or in both these subjects. Employers will therefore

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*C GRADE*—Tasks which are of a routine character and follow well-defined rules, but which require either a reasonable degree of experience or a special aptitude for the task and which are carried out according to a daily routine covered by a time-table and short period control.

*D GRADE*—Tasks which require considerable experience but only a limited degree of initiative and which are carried out according to a predetermined procedure, and precise rules.

wish to satisfy themselves that those they recruit to clerical posts can meet these requirements. In most cases a good pass in the Certificate of Secondary Education or in GCE 'O' level (or the Scottish equivalents) should prove a reasonable guide, though some employers may rely on aptitude tests and other selection procedures rather than, or in addition to, academic qualifications.

### **Main Features of Training Scheme<sup>2</sup>**

#### *A Basic Training in Office Skills and Procedures*

101. We believe that, whatever work the clerk is likely to have to do, it is essential that he should have thorough instruction in a range of skills, operations and procedures which are fundamental to the work of the normal office. These skills seem to us to include:

- (a) general office and postal services—including sorting, distribution and forwarding of mail;
- (b) filing systems and registry work;
- (c) operation of the most common office machines—adding and calculating; photocopying; duplicating; the telephone and other internal communication systems; and (in many cases) the typewriter;
- (d) simple business correspondence and commercial arithmetic (including some elementary statistics).

102. Most often clerks acquire these skills, if at all, as a by-product of their normal day-to-day work in a somewhat haphazard way. We believe it necessary to provide specifically for instruction in these aspects of a clerk's functions at as early a stage as possible in his training—certainly within the first six months. This has led us to consider whether it might be desirable to establish full-time introductory courses (on the pattern of the Danish course described in Chapter III) as a means of providing the basic initial training required.

103. We understand that at least one large manufacturing concern (in the steel industry) has been experimenting with full-time introductory and basic training courses for its clerical intake, and has been sufficiently impressed by the results to extend the arrangement to other works in the group. The advantages (among others) which this approach secures are that the training is systematic, carefully planned and carried out by trained staff; that training

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<sup>2</sup> To be read in conjunction with the recommendations in Chapter IV.

does not depend on the circumstances of the individual firm or office; and that the trainee starts out on his office career having already acquired the most important basic skills, and should therefore be fully productive earlier.

104. It seems clear to us that where a firm is large enough, and has sufficient clerical trainees, there are considerable advantages in its including basic training in a full-time introductory course which the trainee takes before allocation to a particular office. We hope that this path will be followed by larger firms—and encouraged by the training boards.

105. Furthermore, we think it would be desirable to establish a small number of experimental courses in suitable technical colleges in several parts of the country, with the object of providing basic training for clerical employees in medium-sized and smaller undertakings.

106. These courses would provide evidence about the relative advantages of formal off-the-job instruction away from the office as compared with the traditional form of training. In the light of the results achieved, the boards would be in a better position to decide whether the initial training of clerks should generally consist of a full-time course. In any experiments undertaken, it will of course be important to secure a control group of clerks trained in the normal way to compare with those who take part in a college course. The length and syllabuses for these courses should be a matter for detailed discussion between the colleges, local industry and the training boards; but we suggest that the basis for the courses should be training in the skills and procedures outlined above, integrated with commercial and general education. We hope that clerks would take the course at the outset of their training, as soon as possible after entering office employment. We *recommend* that the Education Departments, in consultation with the Ministry of Labour, the industrial training boards and the technical colleges, should explore the possibility of establishing experimental courses on these lines in selected colleges in three or four areas.

#### *B Planned Experience on the Job*

107. The greater part of the clerk's training will inevitably, and quite properly, take place on the job. The objectives to be achieved through planned experience are, first of all, a thorough knowledge of the work and routines of the office or section; secondly, a good understanding of the subject matter, and of the

reasons why work is dealt with in the way it is; and thirdly, an ability to cope with the abnormal or unusual, and to apply written instructions intelligently to such situations. In view of this, we do not think it sensible to insist on frequent moves from office to office. The clerk's career is better served by giving him a reasonable period on each allocation to enable him to settle down properly and become effective in the section. Nevertheless, we *recommend* that the trainee should have experience in *at least* two different kinds of office. Apart from other considerations, this will enable the firm to get a better idea of the trainee's suitability for, and interest in, different jobs; and it will therefore help the firm—and the trainee—to make a better choice of ultimate departmental allocation.

108. We have already referred to the importance of drawing up a detailed training programme to govern training on the job. This programme should include a general introduction to the work of the office and department, and an explanation of its relationship to other offices. Some firms make a practice of getting their trainees to follow an order or a document on its route before it reaches the trainee's section and after it leaves that section. We suggest that some variation on this practice might well be adopted in many instances.

### *C Keeping of Work Books or Journals*

109. We suggest that, as in the case of professional and administrative trainees (and for the same reasons), clerical trainees should be encouraged to keep work books or journals.

### *D Further Education*

110. In order to complement the skills and experience he acquires on the job and to widen his knowledge of industry and commerce, the trainee should be released to pursue an appropriate course of further education as an essential part of his training. The Certificate in Office Studies and the Scottish Certificate in Office Studies have been planned with the needs of the younger clerk particularly in mind, and courses leading to these qualifications are now provided in a large number of colleges. The national bodies responsible for these awards—which have been in existence for only three years—are aware of the need to review the syllabuses in the light of experience gained and are willing to add new subjects as necessary to the range at present offered. This should make it possible for the colleges to provide, in addition to the compulsory subjects, a

variety of options to meet the needs of different kinds of clerk. We *recommend* therefore that in most cases trainees should be encouraged and given day release to study for these Certificates. Where, however, a particular trainee has the intellectual qualities (and academic qualifications) necessary to take an ONC or SNC course, he should, of course, have the opportunity to do so. Where there is some doubt as to the right course to recommend, the employer and trainee should consult their local college of further education and training board official.

### **Length of Training Period**

111. We *recommend* that the period of planned training should generally be not less than two years. This period will enable the trainee to secure a substantial amount of practical experience (up to about one year) in two offices or departments, in the light of which the firm will be able to decide to what department the trainee should be allocated and also whether the trainee should have the opportunity of entering the more demanding training scheme for professional and administrative trainees. It should also give the trainee time to complete the course for the Certificate in Office Studies or the Scottish Certificate in Office Studies, assuming that he attends college one day or the equivalent per week.

*Training Recommendations: 3***OFFICE MACHINE OPERATORS****Coverage of the Scheme**

112. The 1951 Census showed that office machine operators accounted for about 3·4 per cent of the total population of office workers, but 5·3 per cent of female office workers. In our survey of younger office staff we found the proportions to be of very much the same order. The great majority of the operators in our survey were described as accounting machine, adding machine, calculating machine, punched card, computer or addressing machine operators. The recommendations in this chapter apply broadly to these occupations—but with one proviso.

113. Not all office machines require for their effective operation a substantial degree of manual dexterity and skill. On the one hand there is a wide range of (mainly) key depression machines requiring skills of similar order to those required for typewriting and tele-printing. On the other hand, there is a miscellaneous, and growing, assortment of photocopying, duplicating, addressing, collating and guillotine machines on which office workers may be employed full-time but which demand much less manual skill. We are primarily concerned here with the former type, though the line between the two is difficult to draw and our recommendations will in many cases be equally relevant also to the latter group.

**Aims of Training**

114. In most cases the employer expects the machine operator to be equipped to operate efficiently one particular machine. However, in some instances employers require expertise on more than one type of machine, for example on both adding and calculating machines. Although we assume in this chapter that training will generally be on only one machine, or mechanical system, we do not mean to imply that training should always, or necessarily, be limited in this way. The principles of training will, however, generally be the same whether a trainee is instructed on one, two, or more machines.

115. The main objective of training must be to ensure a high degree of speed, accuracy and consistency in the operation of the machine, or machines, on which the girl is to be employed. But the training

must do more than this. It must allow for the possibility that many operators will not remain forever working on one machine. For one thing, new machines may replace out-of-date ones, and it may be essential for the machine operator to adapt accordingly. Secondly, a proportion of operators move on to more demanding or responsible work; and others may transfer, as they become more senior, from machine operation to general clerical duties. The recommendations in this chapter are therefore based on the assumption that the training and further education a machine operator receives must be, in part, a preparation for a working career, which may involve more than the operation of one type of machine.

116. Training for the machine operator should therefore give her:

- (a) a mastery of the skill and techniques of operating the machine or machines equal to that of the experienced operator;
- (b) the ability to understand and follow written instructions and an appreciation of the data being processed;
- (c) a broad interest in the work of her department, and an appreciation of relevant office procedures and systems.

## **Main Features of Training Scheme**

### *A Basic Skill Training*

117. While it may be possible—or necessary—in some situations to provide basic skill training on the job under normal working conditions, it will normally be more efficient and economical for this training to be given full time in a special school or centre, or in a separate part of the office set aside for this purpose. The advantages of a training centre or section are: firstly, closer supervision is possible, and a full-time instructor can be employed; secondly, training can be more systematic, and not dependent on the more or less uncontrolled flow of work into the office; thirdly, it is easier to maintain full and detailed records of trainees' progress, and to provide the kind of work calculated to develop skills most rapidly and smoothly; and, finally, intensive methods can greatly speed up training and produce a competent operator much sooner.

118. These advantages will not be fully realised, however, unless the following principles<sup>1</sup> are adhered to:

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<sup>1</sup> A more detailed and penetrating analysis of the conditions for successful operator training is provided in W. D. Seymour's recently-published book 'Industrial Skills', Pitman, 1966.



(a) there should be standard exercises to illustrate each of the major problems or hurdles the trainee has to overcome. These exercises will be directed not only to developing the skill in an orderly and progressive way, but also to giving the trainee an appreciation of different types of business transaction—simple accounting, calculations, correspondence, etc.;

(b) standards and tests should be established to measure progress reached at each stage of training. These are used to give an incentive to trainees to build up their speed (and maintain accuracy) and also to provide for the instructor an indication of the points of difficulty for the trainee;

(c) it should be recognised that different trainees will progress at different speeds, and the course should be arranged to take account of this;

(d) trainees should be instructed not only in the manipulative and technical skills, but should also be given an appreciation of the purposes of the data they process, why the machine is used and its main features and capabilities;

(e) the instructor must be skilled in instructional techniques and the same instructor should be responsible for a trainee throughout the course.

#### *B Supervised Experience on the Job*

119. At the completion of the basic skill training course—which may last only a few weeks or may require several months' full-time instruction—the trainee should have reached a degree of speed and accuracy in operating the machine which will enable her to take her place in a normal office. There is, however, some danger that if she is not very carefully supervised during the early months in the normal working environment, her speed of operation may fall back, and she may become discouraged. Moreover she will need to widen the range of operations she is able to perform. For that reason, it will be a mistake to regard the training period as having been satisfactorily completed when the trainee emerges from the training school or centre.

120. It is essential that she have the benefit of a period of closely supervised practical training and experience on the job sufficient to enable her to build up her speed and accuracy to the level of the experienced operator. Until this has been achieved, she is not fully trained. During this period, several measures have to be taken to make sure that the advantages of basic training are fully realised:

- (a) careful records should be maintained of the progress the operator makes, and of her output. If she slips back, remedial instruction in the training centre may be needed;
- (b) instruction should be given in office procedures and systems in the department in which the operator works;
- (c) the purpose of the work should be fully explained, and the operator should be given an appreciation of the material being processed and what happens to it before and after she handles it (e.g. an accounting machine operator dealing with payroll ought to know how attendance is recorded).

### *C Further Education*

121. In order to develop their appreciation of office procedures and techniques, and to widen their knowledge of the business world, it is desirable that trainees should attend an appropriate course of further education by day release. The course will depend to some extent on the capacity and employment of the individual trainee, and perhaps also on the type of firm in which she is employed. In our view, the course selected should not be too narrowly vocational in its orientation. It should, for example, give the trainee some insight into human relationships at work, and into wider social issues. It may also provide the opportunity for the minority who so wish to acquire additional office skills or more advanced academic qualifications. In many cases, a course leading to the Certificate in Office Studies or Scottish Certificate in Office Studies will be the most suitable, though it may be desirable to extend the range of optional subjects to meet the needs of machine operators. The new course which the Scottish Council for Commercial Administrative and Professional Education has designed for machine operators (Business Machine Operators Certificate) seems to us to meet these needs admirably.

*Training Recommendations: 4***JUNIOR SECRETARIES AND TYPISTS****Introduction : The Present Pattern**

122. The teaching of shorthand and typewriting for vocational purposes has long been undertaken largely by technical colleges and private secretarial schools rather than in industry. The Carr-Saunders Committee, commenting on this fact in its Report on Education for Commerce, said:

'It is worthy of note that distrust of pre-employment training did not extend to training in shorthand and typewriting. Indeed, none of the witnesses favoured any departure from the present system under which these arts are learnt before employment, and it is evident that the teaching of these subjects before employment begins is widely regarded as desirable.'<sup>1</sup>

123. Since the publication of that Report, the pattern of education and training for girls wishing to learn shorthand typing and secretarial skills has been maintained. Practically every technical college in the country makes some provision for the training of girls in the office arts. A few years ago it was common to offer courses of two years' duration to girls of 15 years of age, and one year courses for girls of 16 plus. Recently there has been a sharp increase in the latter courses and a slight decrease in the former. Generally, in the one year course, about a third of the time is devoted to shorthand and typewriting. Other subjects covered include office practice and secretarial duties, accounting, structure of commerce and, of course, English. Many courses include some form of liberal studies or home economics.

124. Girls of higher academic ability tend nowadays to enrol for full-time courses of two years' duration leading to either the OND or the HND in Business Studies, and to study shorthand and typewriting as additional subjects. In this way they can equip themselves both for a professional career or for senior secretarial appointments. (Some of the largest colleges also offer six months courses in secretarial skills for graduates.)

<sup>1</sup> Report of a Special Committee on Education for Commerce under the Chairmanship of Sir Alexander M. Carr-Saunders, p.20. H.M. Stationery Office, 1949.

125. In view of this generous provision by the education service, any attempt on our part to alter the pattern, or define a new approach, would seem to many misconceived. Nonetheless, an increasing number of firms are making a contribution to the training of shorthand typists and secretaries; and we think it entirely appropriate that they should do so, and that their efforts should be supported by the training boards. We therefore feel we must offer some guidance to assist the boards in determining whether grants should be paid to employers who do train their own shorthand typists and secretaries.

### **Shorthand, Audio and Copy Typing**

126. In so far as a firm intends to train only in the basic skills of copy, audio or shorthand typing, the approach outlined in the previous chapter for machine operators is equally applicable to typists. For the latter, as for the former, a period of intensive full-time instruction (or, at least, some instruction each day of the week) in a special centre or school is of prime importance. This instruction should normally include English and clerical procedures other than shorthand and typing (e.g. filing systems, duplicating, etc.). Similarly, a period of planned experience on the job to consolidate the skills acquired is essential.

### **Junior Secretaries**

127. Assuming a girl has already achieved a good level of proficiency in shorthand and typing, either at a college, a private secretarial school, or in a firm's training school, there are two main routes she might take to a private secretary appointment. The first—which is the more common and, in our view, the more appropriate for younger staff—is to undergo a period of planned experience for a period of a year or more as a shorthand typist during which time she will attend her local technical college one day a week to study for the more advanced group certificates<sup>2</sup>. Her progress is studied during this period and, if it has been satisfactory, she may be offered a secretarial post when one becomes vacant.

128. The second method—which may be found to be particularly satisfactory for the more mature, and academically more gifted, girl—is to provide within the firm a full-time course in secretarial duties. Such a course would aim to cover much the

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<sup>2</sup> Appendix VII gives a list of these group certificates.

same ground as the college courses referred to above, but more intensively. In particular, it should include instruction in:

- (a) Business correspondence—correct forms of address, layout, style etc.
- (b) Filing systems and card indexes.
- (c) Use of normal office machinery.
- (d) Checking and correction of proofs.
- (e) Simple statistical records.
- (f) Different methods of communication.
- (g) Correct use of diary and appointments book.
- (h) Use of reference sources.
- (i) Committee procedures—Agenda, minutes, etc.
- (j) How to deal with 'difficult' situations.
- (k) Reception of visitors.

The course should also give the trainee a reasonable knowledge of the company and its activities, and of the functions of the commercial sections with which the private secretary will have dealings in the course of her work.

*Conclusions and Recommendations*

129. We have attempted to establish a framework within which commercial training can be developed on sound lines. This framework consists essentially of:

- (a) a planned programme of induction, basic skill training, and experience on the job;
- (b) adequate arrangements for supervision of training—both at company and at office level; and
- (c) linking of appropriate further education with training (on a day release, or similar, basis).

*We recommend* that industrial training boards' schemes make it a condition of grant to firms that the training provided for younger office staff meets these conditions.

130. Precise arrangements for calculating grant will naturally depend on the system adopted by each board. *We recommend*, however, that the amount of grant paid to a firm, whose training satisfies the conditions outlined in the preceding paragraph, should take account of the following:

- (a) costs incurred in providing approved off-the-job training, either in the firm's centre or by an external agency: trainees' wages; instructors' salaries; charges on buildings and equipment; fees paid to the organisation providing training;
- (b) cost of supervising training in the firm: salary of training officer or group training officer; part of salary of the manager responsible for training (the cost of training supervisory etc. staff will be mainly covered by (a) above);
- (c) cost of releasing trainees to attend a further education course: trainee's wages; travelling and subsistence expenses; fees paid to the college;
- (d) financial contributions to group training schemes not covered by (a) to (c) above.

131. We have several times made plain our view that adequate supervision of training in the firm is of crucial importance. There are three objectives to be considered in this connection. Firstly, all firms should nominate a senior manager who will have overall responsibility for the training of office staff. Secondly, the responsible manager should, wherever possible, have expert support from either a training officer or (in the case of smaller under-

takings) a group training officer or adviser. Thirdly, office supervisors should be competent to carry out their training responsibilities in respect of trainees directly in their charge. We recognise that an enormous effort will be needed to reach these goals; *we recommend*, therefore, that industrial training boards should:

- (a) encourage firms to appoint or nominate a senior member or director to be responsible for commercial and clerical training;
- (b) provide suitable grant aid to firms which send either their responsible managers or training officers on courses of the kind now being developed by the British Association for Commercial and Industrial Education ('Background to Training for the Office', details of which are given in Appendix IV);
- (c) provide suitable grants to firms which provide training facilities for their office supervisors (or potential supervisors) or which send supervisors on appropriate external courses. Special emphasis should be given to training in instructional methods. The full costs of courses should, however, be met only where the course is linked to a planned programme of training in the company.

132. If the evidence from our survey is any guide, the great majority of firms in the medium-sized bracket have no formal training arrangements. Without doubt the position is worse in the smallest undertakings. Many of both these groups of employers would probably be prepared to make a larger training effort (particularly in view of the levy they will be obliged to pay) if they are supported by expert advice and assistance from outside the organisation; but they cannot possibly afford or justify a full-time training specialist of their own. We believe that the training boards have an obligation to make sure that such assistance is available. Two methods suggest themselves. The first is for the boards to encourage a number of firms to join together in a group and appoint a training adviser who can service and help all the firms in the group. The second method is to appoint a number of commercial training advisers or consultants to their own staffs. The latter should probably be regionally based and would provide expert support for boards' general training advisers. *We recommend* that industrial training boards should follow one or other (or both) of these two courses.

133. In considering the appointment of commercial training advisers, we hope that boards will keep in mind the possible

advantages of joint-appointments by two or more boards. Moreover, we suggest that in some cases the boards might consider co-operating with the larger Chambers of Commerce, some of which have been active in the field of commercial training for a number of years. It might, for example, be of mutual benefit to the boards and some Chambers of Commerce for the latter to organise in their areas a commercial training consultancy service supported financially by a number of boards. *We recommend*, therefore, that in making appointments to posts as commercial training advisers, training boards should consult with each other and with the Association of British Chambers of Commerce.

134. We referred in Chapter VI to the need to experiment with the running of full-time introductory training courses for clerks. We suggested that these courses should be primarily directed to meet the needs of smaller firms; and that they might most appropriately be established in technical colleges. The courses would provide training in basic skills and office procedures combined with some general and commercial education. Responsibility for meeting the cost of the training element would be the firm's, though the boards would reimburse the firms through their grant schemes. The precise content and length of these experimental courses should be a matter for detailed discussion between the boards and the colleges concerned. *We recommend* that the Ministry of Labour and the Departments of Education take the initiative in arranging these discussions.

135. Action on most of the recommendations in this report will be the responsibility of each of the training boards, though we shall be glad to give any assistance we can. We hope, therefore, that all boards will take steps, at the earliest possible moment, to examine these recommendations and to establish the necessary machinery to give effect to them—for example, by setting up a special committee to consider the training of office workers and by strengthening their full-time staff. We hope, too, that they will provide at least as great an incentive to companies to train their office staff as to train technical staff. We are confident that this investment in the 'white collar' worker will yield a handsome increase in office productivity in the years to come.



# Survey of Training for Commercial and Clerical Staff: QUESTIONNAIRE AND COVERING LETTER

Dear

*Central Training Council*

## *Survey of Training for Commercial and Clerical Occupations*

You may know that the Central Training Council appointed under the Industrial Training Act has recently set up a Commercial and Clerical Training Committee whose function is 'to recommend to the Council what guidance should be issued to industrial training boards in respect of training for commercial and clerical occupations'. To secure some of the information necessary to carry out this task, the Committee has decided to seek the co-operation of a representative sample of employers engaged in industry or commerce. It is in this connection that I am writing to you on the Committee's behalf.

The Committee is anxious to have as much information as possible about the form, methods and extent of training provided for office staff; and also about the range of work which such staff are called upon to do. The enclosed Questionnaire has been prepared to obtain this information. The Committee would be most grateful if you would be kind enough to assist by completing it in respect of *your establishment* (if the establishment is one of a group, and it is more convenient for you to make a return for the group as a whole, please feel free to do so).

As you will see, the Questionnaire is in two parts. Part I requests information about numbers of office staff employed; and about the different types of office staff employed. (I enclose an extra copy of Part I for you to retain.) Part II asks for information about any training scheme you may have for office staff under 21 years of age. If there is no such scheme, you need not bother about Part II of the Questionnaire. If you do have training arrangements for office staff, however, would you please complete a separate Part II for each training scheme (I enclose six copies of Part II; if you need any more, I shall be happy to supply them).

I hope that the wording of the Questionnaire (and of the explanatory notes) is sufficiently clear and unambiguous to need little explanation; but if you are in any difficulty and need any advice, please do not hesitate to get in touch with me. I should like to thank you very much, on behalf of the Committee, for any information you feel able to give us. I need hardly add that it will be regarded as confidential.

*Could you please return the completed forms in the enclosed envelope to me by Friday, 1st October?*

Yours faithfully,

Manager/Youth Employment Officer

**Central Training Council  
Commercial and Clerical Training Committee  
Survey into Training of Office Workers**

**NOTES**

1. The term office employee should be understood in its broadest sense to include anyone who deals with data and communications received in an office. Please include all staff engaged on, for example, production control, accounting, personnel, marketing and sales, buying and data processing as well as those carrying out general clerical and administrative duties. *Retail* sales staff, and draughtsmen and other technical, research and scientific staff should, however, be *excluded*.
2. If the firm permits attendance during normal working hours at courses of further education (either by day release, block release or sandwich arrangements) please give the approximate number of employees at present undergoing such courses in column (e) of Question 5 for the category of office staff under 21 years of age.
3. Please tick in column (f) of Question 5 if there is a training scheme or group training scheme for the category of office staff under 21 years of age; and complete Part II in respect of that training scheme. (For the purpose of this survey, you need only complete Part II if it is possible to answer 'yes' to any part of Question 15). If there is more than one training scheme please complete a separate Part II form for *each* scheme.

**PART I**

1. Name of Employer .....
2. Address of Establishment. (If the answers given in the Questionnaire relate to more than one establishment would you please indicate what establishments are covered).  
.....  
.....  
.....
3. Industry or Activity in which establishment is mainly engaged  
.....
4. (a) Total number on payroll at establishment on 1st September 1965.

Males	Females	Total	Office Use

- (b) Total number of office employees of all ages at establishment on 1st September 1965 (See Note 1).

Males	Females	Total	Office Use

5. Please give the following information for each of the main types or categories of office employee under 21 years of age.

Category of Employee (or Job Title) (a)	Number in Category		Brief Description of Work normally done by this type of employee (d)	Further Education (Note 2) (e)	Training Scheme (Note 3) (f)	Office Use Code for Column (a)	No. M/C Line
	Male (b)	Female (c)					
							1
							2
							3
							4
							5
							6
							7
							8
							9

6. How many Part II forms have been completed? .....

Signed .....

Position .....

(e.g. Secretary, Training Officer, etc.).

Date .....

## Survey into Training of Office Workers

## PART II

(To be completed for each training scheme or group training scheme operated).

7. Title or description of training scheme or group training scheme.

--

8. For what category(ies) of employee listed in question 5 is this scheme intended?

Machine Code

1

9. Qualifications required for entry to training.

[Please ring]

- (a) Are any academic qualifications required?

Yes No

2

If Yes, please give details

- (b) Are qualifications in any particular subjects required?

Yes No

3

If Yes, please give details

- (c) Are there any age limits, upper or lower?

Yes No

4

If Yes, please give details

- (d) Is training limited to:—

Males?

Yes No

5

Females?

Yes No

6

[Please ring]

(e) Are any other qualifications for entry required (e.g. skill or experience)?

Yes No

Machine  
Code

7

If Yes, please give details

10. Are aptitude or other tests (including general education tests) applied before acceptance for training under this scheme?

Yes No

8

If Yes, please give details

11. (a) How many people are at present being trained under this scheme?.....

9

(b) Approximately how many trainees do you expect:

to recruit between now and this time next year?.....

10

to complete the course between now and this time next year?.....

11

12. Please describe briefly the job for which trainees in this scheme are being trained, (e.g. general clerk; private secretary; punch card machine operator; computer programmer; salesman; junior executive; accountant, etc).

12

13. What are the main subjects/skills

(a) in which the trainee is expected to become proficient and/or knowledgeable?

(b) which are regarded as subsidiary or background to the training?

14. How long does the training period normally last?

Less than two month

Yes

Two months—less than six months

Yes

Six months—less than one year

Yes

One—less than two years

Yes

Two—less than three years

Yes

Three—less than four years

Yes

Four years or more

Yes

Machine  
Code

1

2

3

4

5

6

7

13

[Please ring]

15. Does the training scheme include any of the following features:—

(a) an induction programme (to familiarise the trainee with the organisation and to give an appreciation of his or her place in it, and some of the more important facts about it)?

Yes No

Machine  
Code

14

(b) a period or periods of formal training (other than a further education course) away from the trainee's normal work place—for example in the firm's training school, or on an external course?

Yes No

15

If yes, how long is the period or periods?.....

What skill/subject is taught?.....

(c) a planned programme of rotation between different kinds of work/office/department?

Yes No

16

If Yes, would you please say which departments, etc.

(d) a planned syllabus setting out the various tasks, skills, etc., in which the trainee must gain experience and become competent?

Yes No

17

16. Does the scheme also include:—

(a) an official specially appointed to supervise and organise the training, and to be responsible to the management for trainees' progress?

Yes No

18

If Yes, what position does he hold?

(b) regular reports on trainees' progress?

Yes No

19

(c) a certificate, or other evidence of satisfactory completion of the training course (other than certificates relating to courses of associated further education)?

Yes No

20

		[Please ring]	Machine Code
(d) are there any other features about your scheme (apart from courses of further education—see question 17 below) not stated above?	Yes	No	21
If Yes, please give details			
17. (a) Are trainees released during normal working hours to attend a course of further education?			
(1) by day release?	Yes	No	22
(2) by block release?	Yes	No	23
(3) by sandwich courses?	Yes	No	24
(b) Is it a condition of release that a trainee should also attend evening courses?	Yes	No	25
(c) for what further education courses do you expect trainees to enrol?			
for Royal Society of Arts or equivalent Scottish, Welsh or regional qualifica- tions	Yes		26
for 'O' level G.C.E. or S.C.E.	Yes		27
for Certificate in Office Studies or Scottish C.O.S.	Yes		28
for Ordinary National Certificate (or Diploma) or Scottish Senior Com- mercial Certificate	Yes		29
for Higher National Certificate (or Diploma) or Scottish Advanced Com- mercial Certificate	Yes		30
for courses preparing for the examina- tions of one of the professional institu- tions (e.g. for accountants, company secretaries, etc.)	Yes		31
for other courses	Yes		32
If Yes, please give details			





## APPENDIX II

# Survey of Training for Commercial and Clerical Staff Statistical Tables

TABLE 1

NUMBER OF ESTABLISHMENTS BY SIZE AND INDUSTRY

Industry group — — —	Size of establishments				Total, all establish- ments
	Up to 249 employees	250– 499 — employees	500– 749 employees	750 or more employees	
Agriculture, forestry, fishing ...	2	—	—	1	3
Mining and quarrying ...	—	1	1	—	2
Food, drink and tobacco ...	36	27	14	12	89
Chemicals and allied industries	16	11	3	3	33
Metal manufacture ...	14	8	7	4	33
Engineering and electrical goods	88	34	21	16	159
Shipbuilding and marine engineering ...	4	4	—	1	9
Vehicles... ..	7	4	2	3	16
Metal goods not elsewhere specified ...	37	12	7	4	60
Textiles ...	47	25	8	6	86
Leather, leather goods and fur	11	—	—	—	11
Clothing and footwear ...	49	16	4	2	71
Bricks, pottery, glass, cement, etc. ...	10	3	—	4	17
Timber, furniture, etc. ...	33	7	—	2	42
Paper, printing and publishing	52	26	4	9	91
Other manufacturing industries	11	8	5	1	25
Construction ...	81	38	7	6	132
Gas, electricity and water ...	9	4	3	1	17
Transport and communication	61	28	12	16	117
Distributive trades ...	152	52	17	20	241
Insurance, banking and finance	46	18	9	4	77
Professional and scientific services ...	50	15	6	9	80
Miscellaneous services ...	121	27	5	5	158
Public administration ...	25	9	5	9	48
Total ... ..	962	377	140	138	1,617

TABLE 2

TOTAL NUMBER OF OFFICE STAFF UNDER 21 YEARS OF AGE  
RECEIVING FURTHER EDUCATION\*  
BY CATEGORY OF EMPLOYEE AND INDUSTRY

Industry Group	CATEGORY								
	Private secretaries			Typists and clerk typists			Machine operators		
	Total No.	No. receiving FE	% receiving FE	Total No.	No. receiving FE	% receiving FE	Total No.	No. receiving FE	% receiving FE
Agriculture, forestry, fishing ...	—	—	—	4	—	—	—	—	—
Mining and quarrying ...	—	—	—	36	3	8.3	2	—	—
Food, drink and tobacco ...	20	4	20.0	225	9	4.0	228	1	0.4
Chemicals and allied industries...	22	—	—	194	10	5.2	107	8	7.5
Metal manufacture ...	4	—	—	123	9	7.3	54	—	—
Engineering and electrical goods ...	100	47	47.0	753	129	17.1	170	6	3.5
Shipbuilding and marine engineering ...	—	—	—	9	—	—	11	—	—
Vehicles ...	8	—	—	56	10	17.9	49	2	4.1
Metal goods not elsewhere specified ...	7	1	14.3	228	33	14.5	90	3	3.3
Textiles ...	6	—	—	119	21	17.6	59	5	8.5
Leather, leather goods and fur ...	2	—	—	6	—	—	10	—	—
Clothing and footwear ...	1	—	—	102	7	6.9	29	—	—
Bricks, pottery, glass, cement, etc. ...	8	—	—	85	—	—	14	—	—
Timber, furniture, etc. ...	4	—	—	65	—	—	63	2	3.2
Paper, printing and publishing ...	12	—	—	241	8	3.3	74	4	5.4
Other manufacturing industries...	17	—	—	105	5	4.8	22	—	—
Construction ...	3	—	—	196	6	3.1	88	4	4.5
Gas, electricity and water ...	—	—	—	35	4	11.4	3	—	—
Transport and communication ...	7	—	—	468	14	3.0	116	—	—
Distributive trades ...	15	—	—	718	18	2.5	856	18	2.1
Insurance, banking and finance...	6	—	—	1,534	60	3.9	437	2	0.5
Professional and scientific services ...	38	—	—	275	2	0.7	26	—	—
Miscellaneous services ...	69	—	—	428	17	4.0	132	5	3.8
Public administration ...	—	—	—	203	33	16.3	22	2	9.1
Total ...	349	52	14.9	6,208	398	6.4	2,662	62	2.3

\* This table relates only to those released to attend courses of further education in normal working hours, through day release, block release and sandwich arrangements.

OF EMPLOYEE												Totals		
Cashiers			Clerks			Professional trainees			Others					
Total No.	No. re-ceiving FE	% re-ceiving FE	Total No.	No. re-ceiving FE	% re-ceiving FE	Total No.	No. re-ceiving FE	% re-ceiving FE	Total No.	No. re-ceiving FE	% re-ceiving FE	Total No.	No. re-ceiving FE	% re-ceiving FE
—	—	—	5	2	40.0	—	—	—	—	—	—	9	2	22.2
—	—	—	39	10	25.6	1	—	—	—	—	—	78	13	16.7
2	—	—	777	43	5.5	33	8	24.2	23	3	13.0	1,308	68	5.2
2	—	—	364	23	6.3	11	7	63.6	12	—	—	712	48	6.7
—	—	—	228	31	13.6	7	7	100.0	15	6	40.0	431	53	12.3
5	2	40.0	959	191	19.9	34	29	85.3	65	9	13.8	2,086	413	19.8
—	—	—	31	3	9.7	—	—	—	2	—	—	53	3	5.7
1	—	—	104	10	9.6	5	5	100.0	5	—	—	228	27	11.8
3	—	—	363	62	17.1	10	9	90.0	21	—	—	722	108	15.0
2	—	—	291	25	8.6	1	1	100.0	30	—	—	508	52	10.2
—	—	—	16	—	—	—	—	—	3	—	—	37	—	—
—	—	—	339	19	5.6	7	7	100.0	15	—	—	493	33	6.7
16	—	—	120	6	5.0	7	3	42.9	6	—	—	256	9	3.5
1	—	—	304	28	9.2	2	1	50.0	24	—	—	463	31	6.7
3	3	100.0	696	51	7.3	4	4	100.0	55	1	1.8	1,085	71	6.5
—	—	—	122	18	14.8	8	4	50.0	9	1	11.1	283	28	9.9
—	—	—	394	52	13.2	7	7	100.0	31	2	6.5	719	71	9.9
—	—	—	179	47	26.3	6	6	100.0	1	—	—	224	57	25.4
5	—	—	1,126	49	4.4	70	8	11.4	38	1	2.6	1,830	72	3.9
156	—	—	3,274	50	1.5	8	—	—	175	15	8.6	5,202	101	1.9
6	—	—	3,810	177	4.6	147	19	12.9	24	—	—	5,964	258	4.3
1	—	—	401	26	6.5	106	20	18.9	27	—	—	874	48	5.5
14	—	—	957	28	2.9	10	—	—	77	—	—	1,687	50	3.0
—	—	—	648	185	28.5	24	13	54.2	7	1	14.3	904	234	25.9
217	5	2.3	15,547	1,136	7.3	508	158	31.1	665	39	5.8	26,156	1,850	7.1

TABLE 3

NUMBER OF ESTABLISHMENTS HAVING TRAINING SCHEMES  
BY SIZE OF OFFICE ESTABLISHMENT AND INDUSTRY

Industry group	Size of office establishment				Total number of establishments having training schemes	Percentage of all establishments
	Up to 24 employees	25-99 employees	100-249 employees	250 or more employees		
Agriculture, forestry, fishing ...	—	—	—	—	—	—
Mining and quarrying	—	—	—	1	1	50.0
Food, drink and tobacco ...	1	4	1	1	7	7.7
Chemicals and allied industries...	—	4	2	1	7	21.2
Metal manufacture...	1	3	3	1	8	24.2
Engineering and electrical goods ...	1	6	3	6	16	10.1
Shipbuilding and marine engineering	—	—	—	—	—	—
Vehicles ...	—	—	2	—	2	12.5
Metal goods not elsewhere specified	3	7	—	1	11	18.3
Textiles ...	1	1	—	—	2	2.3
Leather, leather goods and fur ...	—	—	—	—	—	—
Clothing and footwear ...	1	2	1	1	5	7.0
Bricks, pottery, glass, cement, etc. ...	—	3	1	—	4	23.5
Timber, furniture, etc.	—	2	—	1	3	7.1
Paper, printing and publishing ...	—	4	2	—	6	6.6
Other manufacturing industries...	—	2	—	1	3	12.0
Construction ...	1	9	1	1	12	9.1
Gas, electricity and water ...	2	2	1	1	6	35.3
Transport and communication ...	2	10	7	3	22	18.8
Distributive trades...	14	6	8	10	38	15.8
Insurance, banking and finance ...	1	2	13	15	31	40.3
Professional and scientific services...	—	2	5	—	7	8.8
Miscellaneous services ...	1	3	2	2	8	5.1
Public administration	2	3	2	3	10	20.8
Total ...	31	75	54	49	209	12.3

TABLE 4

NUMBER OF OFFICE STAFF UNDER 21 YEARS OF AGE  
BEING TRAINED BY TYPE OF SCHEME\*  
AND SIZE OF OFFICE ESTABLISHMENT

Size of office establishment	Type of scheme*							Total all employees
	Secretaries	Typists	Machine operators	Cashiers	Clerks	Professional trainees	Others (including programmers)	
Up to 24 employees	—	2	5	16	12	2	1	38
25-99 employees	4	27	18	—	122	121	14	306
100-249 employees	—	13	29	1	310	217	58	628
250 or more employees	25	69	25	—	420	411	194	1,144
Total ...	29	111	77	17	864	751	267	2,116

\* In some establishments having training schemes, there were no staff undergoing training on 1st September, 1965.

TABLE 5

TOTAL NUMBER OF OFFICE STAFF UNDER 21 YEARS OF AGE  
AND NUMBER AND PERCENTAGE BEING TRAINED  
BY SIZE OF OFFICE ESTABLISHMENT

Size of office establishment	Total office staff under 21 years of age	Number being trained	Percentage being trained
Up to 24 employees...	1,902	38	2.0
25-99 employees ...	7,375	306	4.1
100-249 employees ...	6,950	628	9.0
250 or more employees	9,929	1,144	11.5
Total ... ..	26,156	2,116	8.1

TABLE 6

NUMBER OF TRAINING SCHEMES BY TYPE OF SCHEME  
AND ACADEMIC QUALIFICATIONS REQUIRED FOR  
ENTRY TO TRAINING

Type of scheme	Academic qualifications				Total
	None	" O " 1-3 levels	" O " 4 levels +	" A " levels	
Secretaries ... ..	1	1	2	—	4
Typists ... ..	14	4	1	—	19
Machine operators ...	26	3	—	—	29
Cashiers ... ..	3	4	1	—	8
Clerks ... ..	54	21	20	—	95
Professional trainees ...	4	7	70	23	104
Others ... ..	21	6	3	2	32
Total ... ..	123	46	97	25	291

TABLE 7

NUMBER OF TRAINING SCHEMES BY  
TYPE AND MAIN FEATURES OF SCHEME

Type of scheme	Number of schemes which include										
	Induction programmes	Formal off-the-job training					Planned rotation	Planned syllabuses	An official in charge of training	Reports on training	Final certificate
		Less than two weeks	2-4 weeks	1-3 months	Over 3 months	Not stated					
Secretaries ...	1	—	—	—	1	—	1	1	3	3	—
Typists ...	10	—	1	1	7	2	7	10	15	14	4
Machine operators	15	1	9	6	1	—	7	11	21	23	6
Cashiers ...	8	—	1	1	—	—	7	2	8	8	1
Clerks ...	73	12	9	4	5	2	69	45	67	72	20
Professional trainees	78	7	12	9	11	4	96	64	80	97	42
Others ...	26	9	3	—	2	2	12	11	26	11	3
Total ...	211	29	35	21	27	10	199	144	220	228	76

TABLE 8

NUMBER OF TRAINING SCHEMES BY TYPE OF  
SCHEME AND LENGTH OF PERIOD OF TRAINING

Type of scheme	Length of period of training								Total all schemes
	Less than 2 months	2 months —less than 6 months	6 months —less than 1 year	1 year —less than 2 years	2 years —less than 3 years	3 years —less than 4 years	4 years or more	Not stated	
Secretaries ...	—	—	—	2	1	—	1	—	4
Typists ...	—	5	1	9	2	2	—	—	19
Machine operators	6	6	9	5	2	1	—	—	29
Cashiers ...	—	2	—	6	—	—	—	—	8
Clerks ...	14	8	9	13	21	13	15	2	95
Professional trainees	5	1	2	—	19	18	55	4	104
Others ...	18	1	2	1	3	2	3	2	32
Total ...	43	23	23	36	48	36	74	8	291

TABLE 9

NUMBER OF TRAINING SCHEMES BY  
TYPE OF SCHEME AND FURTHER  
EDUCATION COURSE FOLLOWED

	Further education course*						
	R.S.A. or equivalent	"O" level G.C.E. or S.C.E.	C.O.S. or Scottish C.O.S.	O.N.C. (or diploma) or Scottish S.C.C.	H.N.C. (or diploma) or Scottish A.C.C.	Preparation courses for professional institution examinations	Other courses
Secretaries	3	—	—	—	—	—	3
Typists ...	7	1	1	1	—	1	4
Machine operators	1	—	1	—	—	—	11
Cashiers ...	—	—	—	—	—	—	6
Clerks ...	11	17	17	19	8	34	21
Professional trainees	5	3	1	29	25	82	10
Others ...	3	2	4	3	4	6	12
Total ...	30	23	24	52	37	123	67

\* Some training schemes made provision for more than one type of course.

TABLE 10

NUMBER OF TRAINING SCHEMES WITH PROVISION FOR FURTHER EDUCATION BY TYPE OF SCHEME AND WHETHER FURTHER EDUCATION IS BY DAY, BLOCK OR SANDWICH RELEASE

Type of scheme	Provision for further education*			Schemes with conditions of release that trainee should also attend evening course
	By day release	By block release	By sandwich courses	
Secretaries ... ..	3	—	—	1
Typists ... ..	10	1	—	5
Machine operators ...	10	3	1	—
Cashiers ... ..	6	1	1	1
Clerks ... ..	63	7	7	34
Professional trainees	80	8	16	40
Others ... ..	16	2	—	11
Total ... ..	188	22	25	92

\* Some training schemes made provision for more than one kind of release.

TABLE 11(a)

NUMBER OF TRAINING SCHEMES FOR CLERKS\*  
BY TYPE OF SCHEME AND QUALIFICATIONS FOR ENTRY

Schemes open to	Academic qualifications			Total
	None	"O" 1-3 levels	4 or more "O" levels	
Males only ... ..	13	8	8	29
Females only ... ..	10	4	1	15
Males or Females ...	31	9	11	51
Total ... ..	54	21	20	95

\* General and specialist clerks; *vide* Chapter II, paragraph 22.



TABLE 11(b)

NUMBER OF TRAINING SCHEMES FOR CLERKS  
BY TYPE OF SCHEME AND LENGTH OF TRAINING

Schemes open to	Length of period of training								Total all schemes
	Less than 2 months	2 months—less than 6 months	6 months—less than 1 year	1 year—less than 2 years	2 years—less than 3 years	3 years—less than 4 years	4 years—or more	Not stated	
Males only...	1	—	1	3	7	7	9	1	29
Females only	2	2	3	3	3	1	1	—	15
Males or Females	11	6	5	7	11	5	5	1	51
Total ...	14	8	9	13	21	13	15	2	95

TABLE 11(c)

NUMBER OF TRAINING SCHEMES FOR CLERKS  
WITH PROVISION FOR FURTHER EDUCATION

Schemes open to	Provision for further education*		
	By day release	By block release	By sandwich courses
Males only ...	23	2	2
Females only...	5	—	—
Males or Females ...	35	5	5
Total ...	63	7	7

\* Some clerical training schemes made provision for more than one kind of release; only 64 schemes made provision for some kind of release.

TABLE 11(d)

NUMBER OF TRAINING SCHEMES FOR CLERKS BY TYPE OF SCHEME AND FURTHER EDUCATION COURSE FOLLOWED

Schemes open to	Further education course*						
	R.S.A. or equivalent	"O" level G.C.E. or S.C.E.	C.O.S. or Scottish C.O.S.	O.N.C. (or diploma) or Scottish S.C.C.	H.N.C. (or diploma) or Scottish A.C.C.	Preparation courses for professional institution examinations	Other courses
Males only ...	2	5	4	13	3	12	4
Females only ...	2	1	1	—	—	—	3
Males or Females	7	11	12	6	5	22	14
Total ...	11	17	17	19	8	34	21

\* Some clerical training schemes made provision for more than one type of course.

TABLE 11(e)

NUMBER OF TRAINEES BY TYPE OF TRAINING SCHEME FOR CLERKS

Schemes open to	Number of trainees
Males only ...	111
Females only ...	138
Males or Females ...	615
Total ...	864

## *Commercial Training in Denmark, France and Western Germany*

### **REPORT ON VISIT BY MEMBERS OF THE COMMERCIAL AND CLERICAL TRAINING COMMITTEE\***

#### **Introduction**

1. The purpose of our visit was to examine at first hand the arrangements for commercial education and training (particularly of young people) in a representative group of other European countries. Of the two weeks of our stay abroad (12th-26th September, 1965), the first was spent in the Federal German Republic, and the second divided between Denmark and France.

2. During the course of our stay we visited training schools, talked to the various responsible authorities and saw something of the training given in industry. Rather than record our comments on each of our visits and discussions, however, we have chosen to attempt to give an overall impression of the most important features and characteristics of the systems of commercial training in the three countries. We hope this will give a better idea of how the various elements in each system are inter-related and of the principles which govern it.

3. Our report on each country follows broadly the same pattern. First we describe very briefly the organisation of general (i.e. elementary and secondary) education. Then we outline the main features of commercial education and training, and discuss some of the problems or issues which exercise the authorities. Finally, we offer some observations on what seem to us to be the main strengths (and weaknesses) of commercial training in the country concerned.

4. We present our overall conclusions in paragraphs 80 to 89.

#### **Commercial Training in the Federal German Republic**

##### **GENERAL EDUCATION**

5. Schooling starts at the age of six in Western Germany, and all children are required to remain at school until they reach the age of 14 (now 15 in several provinces). The majority of children (we gathered the percentage to be as high as 80) spend the whole

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\* The members who visited these countries were: Miss M. E. Dunn; Mr. H. G. Chapman; Mr. O. W. Standingford; and Mr. A. W. Brown. They were accompanied, as observer, by Mrs. S. Carr of the Confederation of British Industry.

of this eight-year period of compulsory schooling in Volksschule (primary school) while the abler pupils are selected at the age of ten for either a Mittelschule (roughly equivalent to what we might call a technical school, though the analogy is not an exact one) or for a Gymnasium (Grammar School). The boy or girl will remain at Mittelschule until he or she is 16 and has passed the 'Mittlere Reife' examination (equivalent to GCE 'O' Level); the student at the Gynasium will expect to stay on until 18 or 19, by which time he will ordinarily have become qualified for entrance to university.

6. Although compulsory full-time schooling lasts, generally, two years less than in Britain (a fact not generally appreciated), there is a requirement that education must be continued, on a day release basis, up to the age of 18, at a 'Berufsschule' or trade school. Day release is therefore an essential part of training or apprenticeship, whether for commercial or industrial skills. Moreover, it seems evident that the length of the period of apprenticeship is to a large extent determined by the fact that compulsory part-time education continues up to 18. It is scarcely surprising therefore that the period of apprenticeship should, in general, be the same as the period of compulsory day release (i.e. for most apprentices, three years) apparently regardless of differences in the skill and knowledge requirements of different occupations.

#### COMMERCIAL TRAINING AND EDUCATION OF APPRENTICES

7. Commercial training in Germany, like industrial training, is founded largely upon apprenticeship to an employer. It is an important part of the German attitude and philosophy that responsibility for training should rest with the employer; and that training should take place in the undertaking. As one employer we spoke to put it, the apprentice 'grows with the task, through work'. The educational institutions have an important role in training, but the decisive voice is industry's. Indeed, the whole system is operated by industry through a central Board for Vocational Training (Arbeitsstelle für Betriebliche Berufsausbildung) representing, and financed by, the Confederation of German Employers' Organisations (BDA), the Federation of German Industry (BDI), and the Federation of the Chambers of Industry and Commerce (DIHT); and through local Chambers of Industry and Commerce to which all employers must belong. The part played by the Federal Government is a minor one; and the responsibilities of the provincial governments are mainly to provide the vocational schools. This is in line with the tendency in Germany towards decentralisation of decision-making from governmental to quasi-private bodies wherever possible.

8. Apart from the apprenticeship contract, the most significant features in the commercial training system are:—

- (1) the 'Berufsbild' or 'training manual';
- (2) compulsory examinations at the conclusion of the period of apprenticeships;
- (3) the role of the Industrie und Handelskammer (Chambers of Industry and Commerce) in maintaining training standards;
- (4) day release to a 'Berufsschule'.

#### BERUFSBILDER'

9. The training for any occupation or trade is laid down (for the whole country) in what is called a 'Berufsbild'. Strictly speaking, this means 'trade specification', but in fact it includes not only a description of the occupation, but also a list of the subjects and skills to be mastered (syllabus of training); a broad time-table setting out the order in which each part of the syllabus should be covered—a 'Bildungsplan'; and an outline of the examination which has to be taken at the end of the training. When an employer enters into an apprenticeship contract, he automatically binds himself to provide instruction in conformity with the 'Berufsbild' and is not (theoretically at least) at liberty to limit the training given to suit his own requirements.

10. The drafting of a 'Berufsbild' is formally the responsibility of the Arbeitsstelle für Betriebliche Berufsausbildung (ABB) and its various trade committees (there is trade union representation on the committee but not on the Board itself). In practice, it seems that the ABB acts mainly on the initiative of chambers of commerce and employers' (and trade union) organisations, who submit proposals from time to time for new and revised 'Berufe' (trades). On receiving these proposals, the ABB prepares a preliminary draft which is submitted to, and considered in detail by, a large number of interested organisations. In the light of their comments, the ABB prepares a revised draft, which is considered in Committee and then by the Board. Subject to agreement, the 'Berufsbild' is then passed to the Department of Economic Affairs for formal registration as a statutory order.

11. In drawing up a 'Berufsbild,' the ABB starts with a strong bias in favour of the widest possible syllabus. It was evident from what the Director told us that there has been, and is, considerable pressure to split up existing 'Berufe' in the commercial field, or to create more narrowly defined trades—particularly in retail distribution; but the ABB so far has set its face against undue fragmentation and specialisation. Its point of departure is that, firstly, trainees should have as broad as possible an introduction to commercial employment; secondly, that broader training makes for a more adaptable and promotable employee; and, thirdly, that the requirements of an individual firm or sector of industry should not be allowed to restrict the future mobility of trainees. We will draw

attention later to some of the results of this approach. It is sufficient to note, at this point, that it tends to mean that the 'training manual' is designed with the thought that the young person must be horizontally and vertically mobile, and may in due course occupy a responsible position in the firm. In many cases, therefore, the 'responsible positions' provide the starting point for the definition of the 'Beruf.'

12. There are at present 33 'Berufsbilder' for commercial occupations. The most important of these, in terms of numbers of apprentices, are: bank clerk; industrial clerk; retail salesmen; wholesale and export clerk. From this, it will be seen that occupations in wholesale and retail distribution as well as office employment come within the scope of commercial 'Berufsbilder.' Moreover, there is no hard and fast distinction between those who handle and sell goods and those engaged only on clerical work. For example, an apprentice shop assistant is expected to understand something of the processes of buying, store-keeping and book-keeping as well as selling. A further point to note is that one searches in vain for such familiar titles as shorthand typist, private secretary, punch-card operator. Typing is a required skill in some occupations, but it is contrary to training policy to have an apprenticeship devoted exclusively to training in shorthand typing and secretarial skills or office machine operation. For example an industrial clerk apprentice is expected to gain knowledge, skill and experience in such things as: raw materials; buying; stock control; transport and despatching; statistics; book-keeping; legal decisions affecting the firm's affairs; insurance; sales; business calculations etc.—in fact, in virtually every aspect of a manufacturing firm's commercial operations. The final examination for the industrial clerk comprises an essay; a paper on business arithmetic; an exercise to test knowledge of commercial procedure; a paper in book-keeping; and an oral examination.

#### FUTURE DEVELOPMENTS IN 'BERUFSBILDER'

13. Since the ABB was established in 1947 (a similar body existed in pre-war Germany, and under its aegis a number of 'Berufe' had been defined) about twenty new commercial 'Berufe' have been created and a similar number revised. Ten 'Berufe' have been abolished. On the face of it, this does not suggest very considerable activity on the part of the ABB; and it is true to say that officials of the Board are not entirely happy about the progress made in the commercial field. We were told that, because of the relatively small staff, the ABB has been restricted in its activities. Nonetheless some interesting developments have taken place in recent years—or are envisaged. First of all, the ABB seems to have come to the conclusion that splitting commercial occupations on an industrial basis is no longer satisfactory. The 'Berufsbild' and 'Bürokaufmann'

('Office apprentice'—a translation of this 'Berufsbild' is at Annexe A) which was published in 1962 marks something of a new departure in that it is the first attempt in the commercial field to define trades in functional rather than industrial terms. The ABB argues that one must prepare the young commercial apprentice of today for a career in business rather than a career in a particular industry. The Director of the Board thought that ultimately it might be found necessary to have a common basic commercial programme for nearly all commercial apprentices; and he wondered whether, in that event, this initial basic programme could not best be provided in a 'Berufsschule' rather than in an employer's establishment as at present. (Such a conclusion might well be hastened by pressure from the Common Market Commission, and from other countries in the EEC). If this happened, the employer might become responsible mainly for the additional training to equip the apprentice for a specific occupation.

#### TRAINING FOR RETAIL DISTRIBUTION

14. The other significant development in the last year or two has been in retail distribution. It is a development that underlines one of the major dilemmas the Germans face in drafting 'Berufsbilder': whether to widen the syllabus so that it becomes increasingly difficult for firms, and trainees, to follow; or to narrow the syllabus, so that the trainee is less mobile and adaptable. The dilemma is not made any easier by the constant pressure to upgrade occupations from semi-skilled to skilled status; while at the same time there is a tendency for some trades to require less skill. In no field has the ABB faced more problems than in retail distribution.

15. Of the 500,000 or so commercial apprentices in Germany, about 40% are in the retail trades group of occupations (which include, apart from retail trades salesmen, such occupations as chemist shop salesman, bookseller, music shop salesmen etc.). In recent years, there has been considerable pressure to split the retail trade general category into further groups and, at the same time, to divide the apprenticeship into two sections—one for sales work alone, the other to cover both sales and other aspects of a retail business. As a result, in at least two large areas, Düsseldorf and Essen, it has been more or less accepted that the girl who wants to do little more than sell goods to the customer over the counter should be able to take a modified intermediate examination after two years—at which point her training virtually comes to an end. The more ambitious sales apprentice will, however, go on to a third year's training which will equip him for a wider range of work, and possibly in due course for supervisory and managerial responsibilities.

16. In addition to this, and in order to meet the reasonable demands of special sections in the retail distribution industry, there has been

a move to develop what are called 'special training requirements' as addenda to 'Berufsbilder'. These STRs permit some specialist bias to be given to broad general training specifications; and a number have been drawn up for the retail trade salesmen 'Berufsbild' (the same approach has been followed in modifying the industrial clerk 'Beruf').

17. In effect, each of these developments in the retail distribution field has marked a compromise with the broad-based approach, partly to meet the needs of sections of the industry, and partly to allow for the substantial variations in the ability (and ambitions) of apprentices.

#### TRADE EXAMINATIONS

18. We have considered, at some length, the way in which training programmes for apprenticeship are laid down (centrally) by the ABB. We turn now to the equally important issue—how are standards of training maintained. One of the means to this end is the apprenticeship examination which the trainee is required to take at the end of the apprenticeship period. The apprentice who passes satisfactorily receives a certificate to the effect that he is skilled in his occupation. The examination is conducted on behalf of the local Chamber of Commerce by a Board of Examiners representative of the employers, trade unions, teachers and Chamber of Commerce. The Board examines the apprentice's work folder (see para 23 below) for evidence that there has been systematic and complete training on the job and that the apprentice has benefited from it. There are written examinations set by the Chamber of Commerce. Finally, the apprentice is interviewed by the Board, each member of which assesses a grading for the apprentice. These gradings are then averaged in order to produce the final result.

19. Three points struck us about these examinations. First, a remarkable number of volunteers from industry give up time to act as examiners on behalf of the various Chambers of Commerce which are responsible for organising the examinations. Secondly, the examinations are not educational or academic: although they involve passing several written papers, the examinations have a strong practical bias. The examination is not intended to be the end of the *education* course at the 'Berufsschule' but of the training course in the undertaking (which includes a significant element of commercial education). Finally, we noted that, overall, about 82 per cent of apprentices pass their examinations, even though—we were told—the percentage in some occupations (e.g. retail) and areas leaves a 'good deal to be desired'. Those who do not pass the examination are not automatically excluded from employment as skilled or qualified commercial assistants. They will not, however, obtain their 'brief' which entitles them to call themselves qualified; and in the long-term their prospects of advancement will probably be less bright than their successful peers.



20. The Chambers of Industry and Commerce (of which there are about eighty) have a general responsibility for seeing that training in industry and commerce is properly conducted in their respective areas (which are geographical and not industrial). We can only speak of the work of one Chamber—at Bonn—but no doubt the procedure followed in others is roughly comparable.

21. The controls exercised over firms were varied and, it seemed, comprehensive. First of all, the Chamber has to register every apprenticeship contract. While the Chamber has, formally, no power to prevent an employer training a young person, we gathered that a Chamber can in practice (in the present state of the labour market) make it impossible for an unsatisfactory firm to recruit an apprentice. The Chamber may inspect the firm before registering a contract and will invariably do so if the employer has not previously had an apprentice.

22. Secondly, the Chamber may take steps to see that the persons responsible for training an apprentice are reasonably well equipped to guide and instruct the youngster. The Chamber in Bonn keeps a register of firms' trainers (that is, the person in the firm who is generally responsible for training) and a check of their attendance at appropriate courses. They run a 75 hour basic course which all trainers are expected (in time) to have taken, and they also hold regular monthly (evening) seminars to enable trainers from different undertakings to exchange views and discuss common problems. The Chamber also publish a monthly magazine for training officers.

23. Thirdly, the Chamber require each apprentice to keep a record, in a special folder, of the work he does and of his general impressions. This involves the apprentice in a monthly essay which has to be examined by the firm's trainer and, at the conclusion of the apprenticeship, by the examining board. It seemed to us that the keeping of this journal or work book by the apprentice is one of the most important controls of commercial training. It not only helps to improve an apprentice's written work, but forces him to think about the purpose of the work he is engaged on. Finally, it enables the trainer to be better aware of the trainee's problems, and provides the occasion for regular discussion between trainer and trainee.

24. In Bonn, the Chamber expected the training officer or supervisor to have a session of about two hours every week with his apprentices for the purpose of discussion and instruction. In some firms at least, these sessions are held in a special training room which may be equipped with demonstration material. It was regarded as important that apprentices should be dealt with individually or in small groups. Among other things, these sessions are intended to provide an opportunity for linking the practical and school work in the mind of

the apprentice ; and for developing trainees' ability to express themselves orally.

25. Fourthly, the Chamber can give the individual firm guidance, through its training development staff, on the drawing up of detailed syllabuses and timetables to accord with the general directions given in the 'Berufsbild.' Whatever training methods are used in the firm, it is regarded as important that a fairly detailed time-table should be followed as a means of co-ordinating the practical training and the instruction given in the Vocational School. The Chamber's training development staff—in Bonn there were two full-time officials—also help firms with their training problems where asked to do so.

26. It is clear that a great deal depends on the energy and efficiency with which the Chambers of Commerce carry out their functions. It is not difficult to imagine Chambers less active than that we saw at work in Bonn. Undoubtedly standards vary from one Chamber to another—a matter for considerable disquiet on the part of at least one employers' federation. Probably there is also some variation in the degree of supervision of firms ; in the interpretation of 'Berufsbilder' ; and in the level of examinations set. We can only record that what we saw seemed to vindicate the Germans' preference for administering training regulations through local agencies ; but that this system is not without its critics.

#### BERUFSSCHULE (Vocational Schools)

27. We have already mentioned that day-release to a 'Berufsschule' is compulsory for everyone under eighteen years of age. The training of an apprentice is a partnership between the firm and the vocational school. Both are working from the same syllabus and the same time-table covering the period of indenture. We visited a handsome modern school, and we found there a readiness to recognize that the parts to be played by school and firm were complementary : that certain things were best taught in school and others best taught on the job. There is, however, no hard line drawn between school and training on the job. The pupils in a school come from a number of different firms, some of which have no facilities for training in certain aspects of the syllabus. It is regarded as one of the functions of the school to ensure that any gaps in practical training are covered (for example, we spoke to a proprietor of a chemist shop who mentioned that he expected the trade school to teach certain aspects of photographic printing which he could not cover) ; and it seems probable that many apprentices must rely to a considerable degree on instruction in school to get them through the trade test—even though the Germans maintain that the test is intended to measure the effectiveness of training in the undertaking.

28. The school visited was well equipped and courses appeared to be of practical as well as educational value. In the Commercial Depart-

ment, second year students were seen working as a business community. The students, mostly working in pairs, were undertaking various functions of buying and selling, storekeeping, banking, etc. Normal business forms were being used, and there were tokens to represent the goods that were involved. We noticed that the students were provided with typewriters, calculating and adding machines and telephones. Forms were being prepared on a typewriter fitted with continuous stationery attachment. The evident practical bias of this session was contrasted with the more 'academic' instruction in elementary chemistry being given a class of first year apprentices from chemist shops.

#### THE SCHEINFIRMEN

29. We should not leave the subject of training for commercial apprentices without noting a most interesting initiative which has been taken by the German Salaried Employees' Union (DAG). This Union has stimulated the setting up by groups of apprentices all over Germany of what are called 'Scheinfirmen' ('simulated enterprises') as a way of broadening the apprentices' knowledge of commercial functions. Under the supervision of a trainer four or more apprentices can join together to establish a 'Scheinfirma' whose affairs they conduct as though it were a real enterprise, the various transactions and trading correspondence being routed through a central agency run by the DAG. The staff in this agency behave as though they were the organisations carrying on business with the 'Scheinfirma' and, at the same time, criticise the way in which the apprentices conduct business. Over two hundred of these imaginary undertakings have now been set up, and the Union feel that these have added a new dimension to the training apprentices receive.

#### COMMERCIAL TRAINING FOR ADULTS

30. Although much of our time in Germany was devoted to discussion of training arrangements for young people, we also had several opportunities to see and hear something of what was being done to train over-eighteen year olds. Our general impression here was that formal training is provided mainly by employers' organisations and by the two large trade union organisations. It is possible for the qualified apprentice, after several years' further experience, to enter a higher commercial school to study for an advanced commercial certificate, which might qualify him for promotion to supervisory and managerial positions; but we understood that in practice this rarely happens. It seems to be left to private organisations to provide the kinds of course which, in Britain, one finds in colleges of further education. The rôle of Federal and provincial Governments in providing further part-time or full-time vocational courses for adults appeared to be quite limited.

31. On the other hand, the trade union organisations appear to make an impressive contribution. The DAG, for example, ran some 3,000

courses for their members in 1963, and over 73,000 (one sixth of the Union's membership) participated in these courses, despite the fact that they had mostly to attend in the evening, and to pay course fees. Many of the courses were in subjects like shorthand typing and book-keeping, but a number were evidently in what we should call management or supervisory studies. Among the most important of these are the courses at the three 'Academies' (for Export; Organisation and Automation; and Industrial Administration). The academies provide a full-time two-year course preparing senior clerical staff for future positions in middle-management (for example, head of the export department of a large firm). We gathered that there were no other similar institutions in Western Germany. As the DAG representative wryly remarked, the Union has elected to provide training of a kind which, if successful, will mean the loss of numerous members to the ranks of management. It pursues this policy in the hope that other office employees will be attracted to membership by the training opportunities offered.

32. Our impressions that adult training in commerce was largely confined to the private sector seemed to be confirmed by the figures given us by the retail trades' central organisations; participants in courses organised for adults by employers' groups in the retail distribution industry numbered some 270,000 in 1964. We visited a training school in Cologne run by the retail furniture trade—and very impressive it was. The aim of the school is to teach future managers and proprietors (including a significant proportion of sons of proprietors) in the retail furniture trade the technical and managerial skills and knowledge which they will require. Its curriculum consisted in part of a thorough introduction to the design, display and marketing of furniture and fabrics, and in part of studies in the organisation and management of retail furniture undertaking. It seemed to us that if a training board is established in Britain covering the distributive trades it might with some profit have a closer look at this school.

#### TRAINING FOR DATA PROCESSING

33. Perhaps the most interesting training experiment we saw was the DGB school for data processing in Düsseldorf. The school was founded in 1961 because the confederation felt that the need for data processing staff was not being met by the machine manufacturers; and that training facilities should be more widely available. The purpose of the school is to train punched card and computer operators and computer programmers.

34. The minimum age of admission to the school is 21 but there is no upper age limit. The normal age on entry is between 21 and 28, the students having completed an apprenticeship and had some practical experience in business. So far, only 2 per cent of the students have been women. A high standard of general education is

not required. More than half of the students have had only an elementary education ; of the remainder, the majority have attended ' Mittelschule.'

35. By no means all of the students have been in office jobs. Approximately 40 per cent were previously manual workers and 40 per cent clerks. The remainder are civil servants, technicians and others from a wide variety of callings (a few students are from other countries than Germany). DGB subscribe to the view that the line drawn between manual and white-collar workers should not be so clearly defined as it has been in the past. They followed the precedent set by the machine manufacturers who had been successfully training workers without office experience.

36. While students do not need to have had a mathematical training, they should be capable of logical thought. In the first two weeks of the course, the aptitudes of individuals are tested, with the result that about 15 per cent are advised not to continue. Those accepted for training are divided into three categories. Those who are rated satisfactory are advised to concentrate on mechanical data processing. Those rated as good go on to the computer course in the expectation that they will probably become computer programmers working under supervision. Those rated as very good (about 25 per cent of the total) are put into a special class for training as Senior Programmers.

37. Each six months' course is divided into two terms. The first term is devoted to the techniques that have to be acquired by operators and programmers, and the second deals with the applications of punched cards or computers as the case may be. Instruction ranges from the investigation of possible application to the actual machine operation. A range of typical commercial applications is studied, i.e. invoicing and book-keeping, wages, material control and statistics, and management accounts.

38. The school has 20 full-time teachers drawn from people with practical experience. It is recognised that techniques are developing rapidly and that teachers must have time to keep themselves up to date. For this reason, they teach for only 32 weeks in the year, leaving 16 weeks for planning of instruction and study, and 4 weeks for holiday.

39. In addition to the full-time day courses held at the school in Düsseldorf, the DGB arrange seminars in about 100 centres in Germany. These are not intended to train punched card and computer operators, but to enable people to understand these machines and their implications. Each course of seminars lasts for about six months, takes place on Saturdays, and involves a total of 100 hours' attendance. Those who conduct these seminars are local people with practical experience. Teaching material is provided from the School and members of the School staff give advice and assistance as required.

## SUMMARY AND OBSERVATIONS

40. One of the most striking facts about the organisation of apprenticeship training in Germany is the small number of full-time officials employed to work the system. At the Chamber of Commerce we visited—certainly not the smallest—there were only two full-time officials engaged on inspection, advisory and development work. It seemed probable that these could only do a proportion of desirable development and advisory work. At the Arbeitsstelle the staff numbered no more than 30 (including supporting clerical staff), and these are concerned with training for industrial as well as commercial occupations. Both organisations rely to a considerable extent on the voluntary assistance of employers and employers' organisations; for example more than 50,000 people serve on various examinations boards, and no doubt a very considerable number on training committees of one kind or another. It is doubtful whether the system would work with such relatively slender full-time staff resources were employers (or a large number of them) not co-operative and convinced of the value of sound initial training. It is possible that in some parts of the country, where the Chamber is not so active or efficient as it clearly is in Bonn, the lack of thorough inspection of training will lead to slack standards in some undertakings.

41. It is fair to mention in this connection that apprentices in Germany receive a low wage by comparison with junior clerks in Britain. This being so, training costs less, and apprentices are in most areas much sought after. There are, we gathered, numerous employers who are unable to recruit as many apprentices as they would like. In this very tight labour market, there is doubtless a considerable incentive to provide a high standard of training in order to attract suitable young people.

42. It was suggested to us, on one of our visits, that training in Germany suffered from decentralisation. What was meant by this was that each Chamber of Commerce had to 'interpret' the different 'Berufsbilder' for itself, and there was considerable variation in the standards insisted on (e.g. in examinations). We were not made aware that this was a problem causing great concern, but it seems likely that variation in standard between one area and another would be likely under the decentralised system which obtains.

43. Of perhaps greater importance, however, is the apparently quite passive role played by the ABB. The amount of research and fact gathering it can do with its small staff must obviously be limited. It does not seek to take the initiative in drawing up new 'Berufe' and training manuals. Its main task appears to be to reconcile the conflicting pressures of employers, unions and educationalists who are expected to make the running. It is possible that, in a period of rapidly changing industrial conditions, a rather stronger central organ would react more quickly to reform outdated curricula. It may be significant

that after several years' discussion there is still no 'Berufsbild' for data processing.

## **Commercial Education and Training in Denmark**

### **GENERAL EDUCATION**

44. A child in Denmark starts school at the age of seven and follows a seven year programme (which is common to all children, though there is some 'streaming' in the larger schools in the last two years) at a 'Folkeskole' (primary school). At the end of this primary school course, there are three main alternatives. The child can leave school; or he can go on to a three-year course at what is called a 'Realskole' and, possibly, subsequently to a 'Gymnasium' (in effect a Sixth Form College); or, finally, he can remain at the primary school for a further one or two years' education with a strong vocational bias (on the lines, no doubt, of what the Newsom Committee recommended for the fifteen year old in Britain). It is up to the child and his parents to decide which of these alternatives to follow; there is no formal examination or test. The choice is assisted by the fact that during the last year of compulsory schooling vocational guidance is a required part of the curriculum.

45. Most young people therefore enter employment either :

- (1) at the age of fourteen, after seven years' compulsory schooling, with no special academic qualification; or
- (2) at the age of fifteen or sixteen, after one or two years' voluntary extra schooling, with no formal academic qualification but having had a fair amount of instruction of a frankly vocational kind; or
- (3) at the age of seventeen, having passed an examination roughly equivalent to GCE 'O' Level; or
- (4) at the age of nineteen, after having completed a course at a 'Gymnasium' and having probably passed 'studenteraksamen' (matriculation) which is required for entrance to a university.

The majority of the trainees with whom we were mainly concerned are those in categories (2) and (3) above.

### **COMMERCIAL EDUCATION AND TRAINING OF YOUNG PEOPLE**

46. Commercial training in Denmark, as in Germany, is largely based on apprenticeship and is governed by apprenticeship regulations which apply to industrial as well as commercial trainees. The system operated derives, historically, from the merchant guilds apprenticeship of the late middle ages. It is on this foundation of practical training in the undertaking that the Danes have developed commercial training and, because of Denmark's strong mercantile (as opposed to manufacturing) traditions, such training has always received considerable attention both from employers and the Government. While apprenticeship is regulated by statute, the majority of commercial schools are still

run by private commercial associations of employers etc. rather than by local authorities or the state (though the latter provides a subsidy towards the costs of instruction).

47. The law governing apprenticeship (the Apprenticeship Act of 1956) requires an employer to enter into a formal contract of apprenticeship with any young person (under the age of 18) he employs. Although there are certain types of occupation which are excepted from the scope of the apprenticeship Act, it is generally true to say that the great majority of young people entering commercial employment are covered by the terms of the Act and their relationship with their employer is regulated by an apprenticeship contract. This contract must specify the skill or occupation in which the apprentice is to be trained; and a number of regulations under the Act lay down, for different occupations, the broad lines of practical training which the employer is obliged to give.

48. The Act also requires employers to release apprentices to attend commercial school the equivalent of one day each week. Until quite recently most apprentices in the commercial field were expected to attend school in the evenings. The 1956 Act, however, foreshadowed a complete change over to day release (phased over an eight year period) so that by now the majority of commercial apprentices should be undergoing further education during normal working hours. There are some 175 commercial schools for shop, wholesaling and office apprentices, the majority of which operate in rented or borrowed premises (often in local schools, which generally are free from 2 p.m. or 3 p.m. when school children return home).

49. The combined training and education programme followed by a commercial apprentice is intended to prepare him for the 'Commercial Assistant's Examination' after two to three years. The examination (which assumes 800 hours of attendance at commercial school) involves oral or written tests in: typewriting; office background; office organisation; office techniques; mechanical calculations; book-keeping; economic and social affairs; English and German. All apprentices are expected to sit the examination, which is run by the education authorities (i.e. it is not, in the strict sense, a trade test—as in Germany).

50. From what is said above, it can be seen that there are four fundamental elements in the organisation of commercial training of young people in Denmark:

- (a) an apprenticeship contract which obliges the employer to train in accordance with
- (b) training regulations governing practical training in the undertaking;
- (c) a requirement that all apprentices attend commercial school up to the age of 18; and



- (d) a final examination (which is set and marked by the education authorities).

this is the system ; how well does it work ?

#### PRACTICAL TRAINING IN THE UNDERTAKING

51. The training regulations governing the office apprentice (as opposed to the shop apprentice, and the wholesale apprentice, training for whom is covered by separate regulations) was drawn up as long ago as 1939, under powers given by earlier apprenticeship legislation. A translation of this regulation is at Annexe B. It lays down, in general terms, the programme of instruction to be covered by the employer. It gives examples of the kind of experience the apprentice should have: filing, postal duties, dealing with customers, telephone switchboard, invoicing, calculations, stock-control, correspondence, book-keeping. It is, however, open to an employer to include in the contract with an apprentice a provision excluding correspondence or book-keeping from the training programme. Alternatively, the employer may elect to train mainly in book-keeping and 'correspondence' (the latter is roughly equivalent to shorthand typing and secretarial work) in which case only a third of the period of apprenticeship need be devoted to general office experience. The purpose of the regulation is to ensure that training is fairly broad-based and that no young person coming into an office may be employed exclusively and continuously on specialised or restricted tasks. A measure of job rotation is therefore obligatory.

52. We were, however, given to understand that a number of specialised occupations, which presumably are thought to require relatively little in the way of skill or knowledge, are not covered by the provisions of the Apprenticeship Act. A youngster engaged for work of this kind need not receive broader training. Among the occupations mentioned to us (it was not clear whether the list was comprehensive) were messenger boys and girls (charmingly styled 'piccolinos'), card-punch operators, and office machine operators.

53. Every contract of apprenticeship requires the approval of the local employment exchange before it can become effective. We were told that normally, if an employer had not previously taken on any apprentice, the exchange would request the Office Employers' Association to carry out an inspection of the firm to ensure that the employer was able to provide a reasonable standard of training. Apart, however, from the inspection of a firm before the employer is permitted to enter into a contract with an apprentice, there is no formal arrangement for seeing that the training provided is of a reasonable standard, except through the lodging of complaints by the apprentice in the Apprenticeship Court. Presumably, such an action would be very much in the last resort. There is no local machinery to keep a regular watch on training in employers' establishments, and the Danes

show no disposition to establish such machinery. They appear to think that, in any cases of difficulty, the local trade union and employers' representatives should sort the matter out informally, and that, if an employer persisted in providing inadequate training, the time would come when his applications for registration of apprenticeship contracts with the local employment exchange would not be allowed. The authorities have made no systematic arrangements for helping employers to improve the standard of training in their establishments. There is, for example, no national or industry programme of training for office supervisors, or for training officers. There is no requirement that apprentices produce regular work which could be examined at the end of each year, or at the time the apprentice is taking his final examination; and the examination itself is based largely on what the apprentice has learned at school rather than on the experience he is supposed to have had in the firm. Finally, there are none of the training consultants who play so important a part in training in Germany.

54. In fact, the Danes appear to have accepted the view that such improvements in training as may be desirable will have to be achieved through the commercial schools rather than through imposing higher standards on employers. One of our informants went so far as to say that one of the advantages he saw resulting from the extension of practical instruction in the schools was that it would be possible to allow more employers to take on apprentices. It seems clear that it is this thinking which has led to the establishment of one of the most interesting new departures in the training of office apprentices, namely, the ten-week introductory course, which the majority of office apprentices are now required to take at the outset of their apprenticeship. (We discuss this development in paras 58 to 62 below). The Danes we met expressed the view that the trend in office training, as in the training of industrial apprentices, is towards the provision of more training, combined with general education, within trade schools. Although they emphasise that the newly established introductory course is only an experiment, and that the course may have to be modified substantially in the light of experience in the next few years, they are satisfied that something on the lines of this course is desirable.

55. We had the opportunity, during visits to two large concerns in Denmark, of seeing something of what is done by the progressive employer to meet his training obligations in respect of office apprentices. The first of these firms was in the food processing industry; the second in the electrical engineering industry. Both recruited their commercial apprentices mainly from among those who had passed the 'realskolen' examination ('O' Level) rather than from the primary school leavers; and it was clear that they hoped and expected that a fair proportion of their apprentices would in due course be promoted to supervisory and junior managerial positions,

particularly in the sales field. They were not, in fact, recruiting only with a view to filling the ordinary clerical post of 'commercial assistant'. Both firms had a planned programme of job rotation for apprentices, though neither was keen on frequent moves from job to job. Both maintained full records of trainees' aptitudes and progress. Both clearly expected apprentices to do a job of work (typically, involving such routine clerical work as filing, simple book-keeping, invoicing, machine calculations, or dealing with customer queries, etc.).

56. One of the two firms runs a fortnight's introductory course at the beginning of the apprenticeship to inform trainees about the operations of the company, and to give instruction in certain office procedures and techniques. The other firm has a week's induction programme which can best be described as 'orientation to the world of work', part of which is run by the YMCA. The latter firm also organises, for third year apprentices, a course on economics and on the firm's operations. Aside from these courses, however, training is on the job, and must depend largely on the head of department and the apprentice's supervisor and colleagues, few—if any—of whom had had training in job instruction (in one firm, instruction of the new apprentice is largely through the job description prepared by the outgoing apprentice). Some check on training is however maintained by the requirement that the head of department complete a three-monthly report card showing, in some detail, the various functions, etc. in which the apprentice has received instruction.

57. Our overall impression in both these firms was that the managements had given a good deal of thought to the planning of the overall training programme for commercial apprentices, but that they had probably given rather less attention to what happened to the apprentice on each training assignment. We were also struck by the care given by both companies to training its future sales executives (many of them former apprentices) both in home and overseas markets.

#### THE NEW INTRODUCTORY COURSE

58. The aim of the introductory course, which will in future be an essential part of commercial training in Denmark, is to establish a sound practical foundation for subsequent training in the employer's establishment. The idea is that there are certain important skills and knowledge which it is essential that the commercial apprentice should acquire as early as possible in his apprenticeship so that he or she is able to make a real contribution to the work of an office at an early stage, and to benefit more fully from the experience gained in the normal working environment. The syllabus of the course (which is provided in a commercial school) therefore includes a strong practical training element. For example, the apprentice is taught how to type, even though he does not acquire a very high typing speed (120 strokes a minute, or about 25 words per minute). Apprentices are also

instructed in the correct use of the telephone ; adding and calculating machines ; photocopying and stencilling equipment ; and dictating machines. In addition to this, attention is given to instruction in basic office systems like filing, and to various office procedures. All this is combined with some general education in languages and commercial subjects. (One of the notable features of this course, as of commercial training generally in Denmark, is the considerable emphasis given to instruction in foreign languages.)

59. There are a number of interesting features in the introductory course, apart from its strong practical bias. First of all, apprentices embarking on the course have to have nine years' general schooling (that is, they must normally have reached the age of 16, since compulsory schooling does not begin until a child is seven. For those who leave school earlier, there is—until 1967—a special preliminary course in Book-keeping, Danish and English, which will enable them to qualify for the introductory course). The qualifying standard for the introductory course is a frank attempt to ensure that nobody embarks on an office career without a reasonable standard of general education. It is also an attempt, it seems, to secure a reasonably homogeneous group among the students taking the course. This is important because the introductory course is the same for all office apprentices whatever their level of ability (with the exception that apprentices are graded, according to their ability, for foreign language tuition).

60. Secondly, the employer pays in fees between twenty and thirty-three per cent of the cost of the course provided at the Commercial School—in addition, of course, to paying the wages of apprentices while they are on the course (the wages of office apprentices range from about 300 kroner in the first year to 500 kroner in the third and last year of apprenticeship—that is, from about £15 to £25 per month). The balance of the cost of education and training in the schools is met by the central government, which exercises control over the standard of tuition and, in general, over the operation of the schools.

61. Thirdly, the introductory course normally runs for four days a week, the apprentice spending about six hours per day at the school and the remainder of the time with his employer. This shuttling back and forth between the employer's establishment and the school seemed to be accepted as workable ; indeed, one of the Office Employers' Association officials explained that many firms were glad to have the opportunity afforded by the two hours or so per day spent by the apprentice in the firm to observe the progress the apprentice was making.

62. Since the introductory course lasts ten weeks, the schools are able to run four complete courses each academic year for new apprentices ; and because of shortage of school facilities they will have to do so.

This creates two problems. It means, first of all, that only a proportion of office apprentices in any year will be able to undergo the introductory course at the very beginning of the academic year when most apprentices will be recruited. One firm we visited thought that this was, from their point of view, a considerable disadvantage, since they wished all apprentices in any one year to enter the firm at roughly the same time. Secondly, some apprentices will have either to wait some months to begin the course of further education or to begin it on a day release basis before they have taken the introductory course.

#### DAY RELEASE

63. Once the introductory course is completed, the office apprentice spends the major part of his time on the job while continuing to go to the commercial school for one day, or a total of eight hours, each week. The educational syllabus broadens to include a second (or third) language; book-keeping; some economics; office techniques; and a study of the principles of office organisation. The final examination will ordinarily be taken at the end of the second year, by which time the apprentice will (under the new arrangements) be eighteen years old.

#### SHOP APPRENTICES

64. As in Germany, the training of retail and wholesale apprentices in Denmark follows a similar pattern to that of office apprentices. Sales apprentices will undergo an introductory course, followed by day release, in the same way as the office apprentice. The subjects covered are, however, rather different from those studied by the office apprentice. There is stronger emphasis in the introductory course on languages; on the writing of display notices; and, of course, on introduction to shop-selling. Subsequently, several hours each week are given over to study of different kinds of goods; and to shop book-keeping and business calculations. Training in the firm is governed by regulations detailing, for the different retail branches, the kind of experience the employer must provide. For example, the regulation for retail sales training in the textile branch requires the apprentice to be equipped with all relevant knowledge of: goods and their qualities and make up; correct use of tape measure, scissors, cash register, etc.; packing up goods; marking goods; stock-keeping; customer service; telephone switchboard; invoicing; and general clerical work.

#### SUMMARY AND OBSERVATIONS

65. It will be evident from what we have already said that we were particularly interested in the development of the introductory course for commercial apprentices in Denmark. This course seems likely to provide a sound basis for subsequent training and education. It has the advantage that it will enable certain skills (e.g. typing) to be taught in a systematic way by trained teachers. It will provide an excellent introduction to the essential office tools and procedures (calculating

and dictating machines; the telephone; filing and registering documents, etc.); and should relieve employers of certain responsibilities which only the larger and more progressive have probably discharged effectively. Finally, the introductory course seems to provide a most satisfactory and smooth transition from school to office.

66. So far as training in industry is concerned, we were not wholly convinced that the various regulations (and the Apprenticeship Act) are in themselves adequate to guarantee thorough and systematic training. The regulations are couched in very general terms and certain occupations are not covered by the Apprenticeship Act. Training of office supervisors has apparently received little attention; there is no inspection of employers except in connection with the registration of (some) apprenticeship contracts; and there is no advisory service to assist the smaller employer to organise training. It is possible that the system surmounts these deficiencies; we cannot but conclude, however, that the Danes, as well as we in Britain, have something to learn from Germany. This is not to deny the important advantages of having a properly thought out system of legislation covering the relationship between master and apprentice and setting broad standards of training and associated education.

## **Commercial Education in France**

### **GENERAL EDUCATION**

67. All children in France attend primary school from the age of six to eleven, at which stage the brighter ones go on to the secondary stream while the remainder continue at primary school until they reach the school leaving age of 14. There are two main secondary streams; first the 'collèges d'enseignement général' and 'collèges d'enseignement technique'; and, second, the 'lycées (techniques, modernes, et classiques)'. The latter are, by and large, intended for those who can benefit from a more demanding education and who expect to remain at school until they are eighteen. The former provide continued general education on the lines of a secondary modern school in Britain, or give both general and vocational instruction up to the equivalent of a craft certificate.

### **COMMERCIAL EDUCATION**

68. The Ministry of National Education is responsible for the vocational guidance and training of young workers, whether they remain in education establishments or enter industry. The bulk of commercial education in France is provided in 'collèges d'enseignement techniques' and lycées techniques as, in effect, a continuation of full-time education within the state system. In marked contrast to Germany and Denmark, little commercial training (of young people) is given in industry; and the training of those few who are formally apprenticed to an employer is often patchy and unsystematic (if not

completely neglected). It is, in general, true to say that the whole effort of the French authorities is directed towards the provision of formal training in schools (state and private) rather than to the development of commercial training in industry. The apprenticeship tax which most employers are required to pay (but on which they can claim a rebate if they spend money on training) reinforces this policy since, in practice, the rebate is more readily obtained if an employer makes payments to a private or state school than if he takes the trouble to provide training in his firm (the rate of levy, 0.4 per cent of payroll, is in any case on the low side to act as an incentive to an employer to train). The French authorities appear to take the view that it is neither realistic nor practicable to expect employers to give training of the standard and breadth required for the full development of young people. They believe that it is, in any case, desirable that young people (up to the age of 17 or 18) should so far as possible remain within a full-time educational institution.

#### COLLEGES D'ENSEIGNEMENT TECHNIQUE

69. The 'collèges d'enseignement technique' (CETs) are state technical schools which prepare students for the first state technical qualification — 'Certificat d'Aptitude Professionnelle,' roughly equivalent to a craft skill certificate. The majority of these colleges, we gathered, specialise in a particular range of skills or industry (e.g. engineering, building, commerce etc.) and the ones we visited catered exclusively for commercial students. Young people enter the CET at the age of 14 or 15 and undergo a three-year course of which about half consists of general education and half vocational education and skill training. They work a forty-hour week, but have the normal school holidays. The majority of commercial trainees specialise in either shorthand typing, book-keeping, or general office work, for each of which a separate certificate is available. No industrial experience is required before the certificate is awarded, but the colleges go to some pains to provide realistic material for practical instruction in such things as entering transactions in a ledger, filing, payment of cheques and so on. Moreover, the colleges maintain contacts with industry through their governing boards and (honorary) industrial advisers ('conseillers'). Nonetheless, we had the impression in both the colleges we visited that the atmosphere was that of an education institution rather than a training centre. In fact, when the current educational reforms are complete, and the school-leaving age is raised to sixteen (in 1967) the intention is that CET's should become an integral part of the secondary education system.

#### LYCEE TECHNIQUES

70. The 'lycées techniques' (technical high schools) prepare pupils for several different qualifications above craftsman level. Pupils generally enter at fifteen years of age, for at least a three year course. For the academically more gifted, who can look forward to university,

there is the 'Baccalauréat Economique,' normally completed at eighteen or nineteen. Pupils who wish to specialise in less 'academic' subjects study for the 'Brevet Commercial' and, if they continue further, for the 'Brevet Supérieur.' The first of these awards generally involves special proficiency in shorthand typing and book-keeping; the second in secretarial duties, accountancy or machine accountancy. A requirement for the 'Brevet Supérieur' is several months' supervised experience (a 'stage') in an industrial or commercial undertaking.

71. The 'lycée' we visited appeared to be very well equipped with typewriters of various makes, duplicating and photocopying machines, calculators and accounting machines, so that the pupils could get experience with a representative range of the machines they would find in industry. The school seemed to experience no great difficulty in finding suitable firms in which the pupils (all girls in this instance) could do their 'stage.' The supervision of this industrial posting is carried out by members of the staff, who make it their business to visit the firm from time to time to see that the pupil is making the best use of her opportunity. Presumably these visits also have the advantage of keeping teaching staff—and particularly those concerned with commercial subjects—up-to-date with what is going on in industry (and *vice versa*).

#### PRIVATE SCHOOLS

72. Although private schools at present bear less than one-quarter of the burden of training, it is not improbable that their numbers will be increased substantially in the future if the present, quite generous, state aid to 'recognised' schools is continued. There is, only too evidently, a considerable demand for more training to supply the secretaries, typists etc. which industry needs; and it is unlikely that the demand can be met by expansion in the public sector alone. We understood that the majority of private schools are run by employers' organisations and Chambers of Commerce, and that the more reputable ones are recognised (and inspected) by the Ministry of Education. Of the two schools we visited, one was run by the Paris Engineering Employers' Association; the other by the Paris Chamber of Commerce. The courses at the Engineering Employers' Association centres are of two kinds; first, part-time day courses in typing and shorthand for employees who are selected by their firms for training for promotion to secretarial vacancies. Many of these employees have not had the opportunity of training on leaving school, and some are selected from the factory floor. In the course of some four months' intensive (two hour daily) tuition, the centres expect to train a typist who can achieve a minimum of 25 wpm (and often considerably more). A separate course for shorthand lasts five months.

73. The second type of course, for girls of 16 to 18 years of age (with the equivalent of, at least, 'O' Level qualifications) is for training



secretaries and shorthand typists. They are not employed and have to pay their own fees for the instruction given. The course lasts nine months, and involves four hours' instruction daily. Apart from skill in shorthand and typing, the course puts considerable emphasis on teaching students to cope with real (and embarrassing) problems likely to be met in the work situation.

74. While neither type of course can be said to involve any new approach to training secretaries and typists, both contrast strongly with the longer courses typical in the state schools. The Association has clearly found out what its members' needs are, and has gone out to satisfy them in the most economical way. There is evidence that they have been most successful.

75. The Paris Chamber of Commerce School for Girls has built up a considerable reputation among employers over a number of years for training girls for top secretarial and similar posts. The course lasts two years, is full-time, and covers not only shorthand, typing, and commercial subjects but also political economy, law, banking, book-keeping etc. What distinguishes the course from similar ones in France and Britain, however, is not the subject matter but the emphasis the school gives to simulating 'real' commercial life. During the second year of the course, students spend much of their time running commercial 'undertakings,' engaging in real transactions (with copies of commercial documents—and currency). The staff of the school have established six 'dummy' firms—complete with personnel records, filing systems, sales organisations etc.—and every second-year pupil has experience in conducting the affairs of one or more of these firms and looking after such diverse operations as purchasing materials, launching a new product, reorganising the filing system—under the supervision of a member of staff. No trouble is spared to lend the exercise realism; and some million commercial documents of one kind or another pass backwards and forwards during the course of a year's 'business.' At the end of the second year's course, moreover, the examination which is set follows the same pattern. It consists in the girl acting, for a week, as secretary in a busy executive's office. She has to answer letters, deal with telephone calls, take dictation etc., involving the display of initiative, imagination and coolness under stress. Having passed this test, girls are required to do a three-months' 'stage' in industry before finally completing the full two-year course.

76. It need scarcely be said that the preparation of the vast number of documents required, and the time and effort which go into the work of simulating commercial operations, require a large clerical staff as well as a generous staff/pupil ratio. We were told that for every two members of staff there was one clerical assistant; and that members of the staff are released to spend a term in industry every year when their second year pupils have left for their industrial

experience. In this way the staff are able to keep fresh and develop ideas for new 'ventures.' Few schools would be able to afford so elaborate an apparatus of realistic training and we were left wondering whether it might not be preferable to establish a central organisation for developing the case studies and documentary material for a number of different schools.

#### SUMMARY AND OBSERVATIONS

77. Although in some of the establishments we visited the staff laid stress on the importance of including realistic material in the various courses, there appears to be no move in France towards more training on the job of young commercial trainees. It is argued that the employers would not generally be prepared to accept the demands this would entail; and the education authorities clearly believe that training could not be so effectively organised in industry as in special schools. There is without doubt a good deal of evidence to support these views: to misquote a French aphorism 'industrial training is much too important a matter to be left to industry.' The question is: are there important disadvantages as well as advantages in this approach? Although we did not have enough time to pursue this question, it did seem to us that an exclusively full-time training system has some serious drawbacks—quite apart from its cost.

78. We have referred to the feeling we had in several schools that we were in education rather than training institutions. There was no great emphasis on training for work, for productivity (except in the private schools). Students were not therefore likely to be very well prepared for the transition to industrial working conditions. Secondly, it did not appear that there was as close a working relationship between industry and the education world as there is in Germany. This may mean that teachers do not keep themselves up-to-date with changes in industry; that the training programmes do not sufficiently reflect the requirements of employers; and that industry does not consider its training role to be of any importance. Finally, there is the practical point that a very large burden is borne by the state educational system, and it is clear that the system is not able to expand fast enough to meet the demands of industry for trained secretaries etc.

79. It is possible that some of these problems may be surmounted by encouraging employers' organisations to establish more private training schools which, in the nature of things, will have closer links with industry and a greater awareness of practical needs. Whether or not this is so, however, we believe that the French give insufficient attention to the need to secure a balanced programme of on-the-job training and experiences as well as skill training and education off-the-job.

## Conclusions

80. We attempt in these final paragraphs to summarise our main impressions and conclusions about commercial training in the three countries we visited, and to suggest some of the lessons we in Britain might learn from their experience. In making these suggestions we are very much aware that institutions and practices in other countries have developed in an environment, and as a result of circumstances, which are in many ways quite different from those that have influenced commercial training and education in Britain. Nonetheless, we were impressed by the fact that each of the three countries appears to be facing problems very similar to those we are familiar with—the need to increase educational opportunities; the importance of making the best possible use of scarce manpower resources; the desirability of achieving a labour force which is capable of adapting itself to rapid changes in industrial and commercial life, etc. Moreover, in Germany and Denmark at any rate (as in Britain) it is accepted that the vocational training of young people, in commerce and industry, should be a joint effort involving industry and the education service, the firm and the vocational school. These similarities make it possible to compare the approaches in the four countries and to learn something of significance from the comparison.

81. Perhaps the first point to emphasise is the extent to which, in Germany and Denmark as well as in France, further education and training are inextricably linked. In all three countries it is a legal requirement that the young person who is being trained in industry should undergo continued part-time education until reaching the age of eighteen (in practice, this is somewhat laxly enforced in France). Further education is therefore an essential component of industrial and commercial training, whatever the occupation or level of ability of the trainee. Two important results flow from this. First, the latter years of education are partly or mainly vocational in character, and are intended to complement training in industry. Compared with Britain, children in the three countries generally spend two years less in full-time schooling, but make up for (some of) this by three years' part-time vocational education.

82. Secondly, the period of training tends to be governed by the fact that a boy or girl trainee must be released for part-time education up to the age of eighteen (just as, in Britain, the period of apprenticeship reflects the age at which the full skilled rate is paid!). This being so, there is every excuse and opportunity to insist that training be as broadly based as possible.

83. The importance of broad-based training for young people receives a good deal of emphasis in all three countries, but especially in Germany. The objective of training is seen as a mobile (horizontally, between jobs; and vertically, from junior to responsible posts) and

adaptable labour force. We have drawn attention to two implications of this emphasis : training is not for specific employment in a particular undertaking, and the training syllabus assumes that the boy or girl should be able to go on to responsible positions. It is difficult to quarrel with these objectives. There are, however, several awkward issues to be confronted in pursuing them. First of all, not all trainees for a commercial trade will be of similar ability or have similar ambitions for the future ; yet all alike will be required to follow the same training programme and the same educational course. This may mean that the course is either too demanding for some, or too easy for others (or both !). The Germans admitted that this was a great problem in the retail field ; but it is difficult to believe it is a problem confined to shop assistants. The Danes, in effect, recognise several different categories of training for office apprentices (including a considerable degree of specialisation in shorthand and typing, or in book-keeping) and they are now attempting to ensure that all office apprentices reach a reasonable standard of general education before entering office employment. The French colleges and lycées (as well as private schools) train for more specialised occupations, albeit with a fair amount of general commercial instruction ; and they provide courses at several levels to suit the ability of students.

84. Secondly, if the training syllabus to be followed by an apprentice is extensive, many firms will be unable to provide adequate instruction and experience in every part of the syllabus. An extra burden may then fall on the vocational schools. It was noteworthy that in Denmark and Germany there was an open acceptance of the fact that in the future these schools would have a larger part to play in training than in the past.

85. It seems to us that the conclusion to be drawn from all this is that, while it is highly desirable to have a basic commercial training (part education, part skill training) common to a wide range of commercial occupations, it is probably necessary to accept a degree of specialisation thereafter according to the ability and probable future employment of the trainee. In this connection, we believe the range in type and level of courses provided by technical colleges in Britain to be a priceless asset which other European countries have cause to envy.

86. We were particularly struck by the significant innovation the Danes have made in instituting an introductory course for commercial trainees. Although relatively short (240 hours spread over ten weeks), the course should give commercial apprentices the kind of 'flying start' which has long been regarded as desirable for technical trainees. Although there are certain practical difficulties in the Danish introductory course (for example, in arranging for all trainees to take the course at the outset of their apprenticeship), we think that serious considera-

tion should be given in Britain to carrying out experiments of a similar kind.

87. The best syllabus in the world will be worthless unless the firm is able to provide effective training—and unless there are some checks to see that it does. The Germans have built up over the years a system which not only keeps firms up to the mark, but—equally important—gives them assistance in reaching that mark. The most indispensable elements in the system seem to us to be :

- (a) the training of firms' trainers ;
- (b) the keeping of journals or note-books by apprentices, coupled with regular informal discussions with the person responsible for training ;
- (c) the inspection and advisory service provided by training development officers employed by the Chambers of Industry and Commerce ; and
- (d) the examination which apprentices are required to take at the end of the training period.

88. It is customary to emphasise the function of examinations in maintaining the quality of training. The examinations are obviously of considerable importance, but we believe equal (or even greater) weight should be given to (a), (b) and (c) above. As far as we could see, the staff resources devoted to inspection and advisory work—in Bonn, at least—were probably inadequate to deal with more than the most pressing problems ; and the effort devoted to training supervisory and training personnel was of quite recent origin. In these circumstances, an undue burden may fall on the examination system. We should do well to avoid this danger.

89. The institution of 'Scheinfirmen' (simulated or 'dummy' firms) makes a significant contribution to commercial training in Germany, although the number of apprentices involved is probably a smallish proportion of all commercial apprentices. We were much attracted by the idea suggested by the 'Scheinfirma' scheme of having a central body which could prepare instructional material for use in firms employing commercial trainees. There might be very considerable benefits to be derived from making available to firms' trainers a variety of practical exercises and simple hand books which could extend the range of training given and also help to relate training to further education.

#### ACKNOWLEDGEMENTS

90. It remains to us to record our appreciation of, and thanks for, the efforts made in each country to provide an interesting and worthwhile programme. More particularly, our thanks are due to the three Labour Attachés (Mr. A. J. S. James in Bonn ; Mr. L. Hagestadt in Paris ; and Mr. K. Kenney in Scandinavia) who not only went to a

lot of trouble to arrange our programme, but made us welcome in numerous ways. We should also mention our debt to Fräulein Dersch, who acted—with considerable skill and charm—as our interpreter in Germany; to Herr Vilner of the Danish Office Employers' Association, who not only gave up a Sunday for our benefit but did much else to ensure that our stay in Denmark was profitable; and to Mlle. Fauvin and her colleagues in the Ministry of Education in France. Everywhere we went we received generous—not to say lavish—hospitality, which made our visit most enjoyable as well as highly instructive.

#### ANNEXE A

### Training Regulations for the Office Clerk in Western Germany

( ' Bürokaufmann ' )

Apprenticeship Period : 3 years

#### CONTENT OF TRAINING ON THE JOB

Use and care of the normal working equipment of an office	Book-keeping
Dealings with the post, the railways and other means of transport	Costing and calculation
Registry work	Stock Control
Planning and supervision of forward transactions	Elements of industrial organisation and the use of organisational aids and office machines
Organisation and maintenance of card-indexes	Wages and social insurance
Presentation and analysis of statistics	Elements of personnel work
Practice and use of shorthand and typing	Elements of taxation
Correspondence	Elements of insurance
Commercial arithmetic	Elements of the principal statutory regulations of commercial practice
Cash accounting	Introduction to Economics
Payment and credit transactions; elements of reminder action and legal proceedings	Desirable: introduction to the principle, the possibilities and the effects of mechanical data processing

#### THE OCCUPATION OF OFFICE CLERK

In a modern economy, with its division of labour, the sphere of operations of the office clerk is becoming more and more clearly differentiated from that of the salesman.

The work of the salesman is conditioned by the market and therefore brings him into direct contact with the products or services of his particular branch. In this connection, it necessitates special knowledge

in the field of buying and selling and skill in dealing with customers and purveyors.

The duties of the office clerk, on the other hand, lie in the direction of commercial administration and the organization of operations inside the undertaking. For this purpose he must not only be thoroughly familiar with office practice and the office procedures in use at the time; an extensive knowledge of industrial management will also be needed. It is this that enables him to make the decisions involved in the running of the undertaking and the structuring of its organization.

The office clerk is required in all industrial undertakings. His many-sided activities are basically of the same type in all branches of the economy and even in large areas of the public service. His work may be of a general or of a specific character, depending on the type and scale of the undertaking. It may consist, e.g. in the organization of the office, in payment and credit transactions, in certain kinds of accounting, establishment work, wages and social insurance. His functions also include, *inter alia*, the presentation and maintenance of statistics and the establishment and maintenance of card-indexes and catalogues. The office clerk must work together with all departments of his undertaking.

The many-sided and responsible activities of the office clerk make it essential that he should be familiar with the normal working materials of an office (forms, address and telephone books, registration and card-indexing equipment, dictating, typing and duplicating apparatus, counting and booking machines) and that he should himself be able to use technical writing appliances. A good knowledge of arithmetic, and a firm command of the German language and spelling are requirements for entry into this occupation. It demands reliability, a strong sense of order and great conscientiousness.

Although in general primary education with a good final report are sufficient for entrants to this occupation, further schooling is an advantage.

For a good office clerk there are opportunities in all branches of the economy. His broad training and vocational experience, not restricted to any specific branch, make it possible for him to change his industry or line and to find his bearings very quickly. He is also prepared in advance for initiation into the interesting field of mechanical data processing. After he has proved his worth and received further training, there are good prospects of advancement.

#### VOCATIONAL TRAINING PROGRAMME

The Vocational Training Plan is intended to give more detail about the Occupational Specification and general directions for the systematic implementation of industrial vocational training. It contains

examples of how the apprentice should be introduced to, and instructed in, the subdivisions of the occupation.

Where individual items in the occupational specification are not marked with 'Elements,' complete mastery of the subject is expected. The word 'Elements' expresses the fact that in these cases a lower level of training will suffice. A further limitation is contained in the concept 'Introduction'; in these cases detailed knowledge is not expected of the apprentice.

The distribution of the items in the Vocational Training Plan corresponds to that in the Occupational Specification. It does not govern the chronological order of training. The sequence in which the listed requirements are imparted has to be adjusted to the training resources and needs of the undertaking. Each apprentice-master must therefore prepare a time-table which will ensure that the training programme is covered in a way that both meets the educational requirements and is appropriate for the employer.

### *1 Use and Care of the Normal Working Equipment of the Office*

The apprentice is to be made familiar with the normal working equipment of a commercial office and how it should be treated. This includes typewriters, addressographs, adding and calculating machines, dictating machines, telephones, teleprinters, etc. He should also be acquainted with the customary printed forms and their use. He should learn how to receive and transmit telephone enquiries and how to give information by telephone. He should be able to use telephone and address books (internal, local, long-distance and foreign calls, telephonic spelling aid).

### *2 Dealings with the Post, the Railways and Other Means of Transport*

The apprentice should be made familiar with all jobs normally connected with incoming and outgoing post. In particular, he should be able to prepare outgoing correspondence and mail of various types (printed matter, registered, valuables, express, etc.), despatch post-paid mail, keep the post-book and postal records, and acquire a knowledge of the principal charges. According to the circumstances of his training undertaking, he should be acquainted with the resources and conditions of the different means of transport (railways, shipping, air, local and distance goods traffic); he should be able to fill up the necessary forms (e.g. forwarding papers for cargo, rapid and express goods, parcel forms, customs declarations, express goods forms, bills of lading, etc.) and he should be instructed in the accounting methods of the transport systems and freight-carriers concerned. He should be conversant with the customary technical terms (e.g. gross, net, tare, cif, fob, etc.). He should learn how to use timetables.

The apprentice should be instructed in the various methods of transmitting news (telegrams and teleprints) and in the use of the customary abbreviations.



### *3 Registry Work*

The apprentice should become acquainted with the purpose and significance of a registry as a place of deposit for written material. He should be instructed in the principles and various possibilities of a place of deposit for written material and, in practical work, have sufficient grasp of at least one system for the custody of written material to be able to plan and run a registry on his own. This presupposes that he knows the aim and structure of the filing system. In the registry he should be specially encouraged to develop orderly and careful methods of working. He should become acquainted with classification procedures (sequence, differentiation, advance classification); with the instructions of the undertaking concerning the loan of documents; and with the statutory and other regulations for the disposal of out-dated documents. Work in the registry should give him an insight into the organization of the undertaking.

Where possible, the apprentice should also become acquainted with the purpose and structure of a records department.

The apprentice should be encouraged to arrange work in progress in such a comprehensive and perspicuous manner that it is always available and ready to hand for further operations at the appropriate moment ('Bring-up-again' File). He should be familiar with the working instructions in use in the undertaking.

### *4 Planning and Supervision of Forward Transactions*

The apprentice should be acquainted with the customary controls-aids and their use (date calendar, day book, date cupboard, card-index of dates, etc.). In this connection he should become acquainted with the meaning of concepts such as delay in delivery, respite, etc. He should know what damages may be incurred when appointed dates are not observed (e.g. taxation, expiry of bills and delivery dates, etc.). The apprentice should learn how the planning of dates is carried out, regard being paid to the circumstances and resources of the undertaking. Where there is a special department responsible for this work, he should be employed for some time in it.

### *5 Organization and Maintenance of Card-Indexes*

The apprentice should learn that card-indexes are an important instrument of organization, and that they are employed for the most diverse purposes—subject index, staff index, dates index, etc. He should be acquainted with the planning of a card-index, the distribution of the distinguishing-marks selected, the arrangement of the headings, and the description and marking of card-indexes. He should be acquainted with the kinds of card-indexes according to their technical classification, and should be able to organise and run a card-index for special subjects.

## *6 Presentation and Analysis of Statistics*

The apprentice should be acquainted with the simple statistics maintained in the training undertaking. He should be able to set out such statistics himself, to maintain them and to evaluate them according to instruction. In addition to this, he must be competent in checking figures, summarising them, analysing them and also presenting them in simple tables. Where there is a separate statistical department, he should be employed in it for some time.

## *7 Practice and Use of Shorthand and Typing*

Shorthand and typing are to be learned at a school or by taking classes. A minimum proficiency of 100 syllables and 120 strokes a minute, respectively, is to be aimed at. Care is to be taken that the writing is neat, accurate and correct in form.

## *8 Correspondence*

The apprentice should learn the basic concepts of commercial correspondence by means of actual operations in the business. He should then draft simple letters on his own and in this way practice style, spelling, grammar and punctuation. Stress should be laid on correct form in the drafting of documents.

An insight into complete operations will help him to grasp essentials and form a judgement as to the importance of clear expression in letters. After he has gained sufficient confidence, he should also practise dictating letters, and, where possible, the use of a dictating machine. The apprentice should learn how to make notes of discussions and telephone conversations.

## *9 Commercial Arithmetic*

Arithmetic, both mental and written, is to be practised under realistic conditions at every opportunity. The apprentice should learn how to use the customary aids to calculation (counting machines, slide-rules, calculating tables). Arithmetic is of great educational importance; it helps to make the apprentice orderly and responsible. Commercial arithmetic presupposes an accurate knowledge of the four basic processes of calculation, and of calculation with decimal fractions and vulgar fractions. On this foundation, the apprentice can proceed to learn percentage and interest computation. Instruction is to be given in the technical calculations used in the undertaking.

## *10 Cash Accounting*

The apprentice should be acquainted with the requirements of methodical cash-accounting (booking payments in and out, the function of vouchers, control of cash). He should in this connection practise the rendering of cash returns. Where opportunity offers, he should also become acquainted with the use of a cash register. The apprentice should be given an opportunity of keeping cash on a

small scale—petty cash, for example—alone and on his own responsibility.

#### 11 *Payment and Credit Transactions; Elements of Reminder Action and Legal Proceedings*

The apprentice should be made acquainted with the various types of payment transactions and should receive instruction about the most important foreign currencies. He should also be told about the significance of cheques and bills and the conduct of transactions in cheques and bills. This presupposes that he is conversant with the principal provisions of the law relating to cheques and bills.

The apprentice should know how an account is made out in the correct form and is receipted. He should have some experience in the collection of outstanding claims and in this way become acquainted with the basic features of reminders and legal proceedings (e.g. collection on delivery, issue of an order to pay).

#### 12 *Book-keeping*

The apprentice should be given the necessary knowledge about the functions of book-keeping and the statutory provisions on the keeping of books. He should be acquainted with the book-keeping system of his training undertaking, its customary methods of organization, and the arrangement and planning of its accounts. He should book simple transactions, carry out simple balancing operations and co-operate in the production of summary statements for the undertaking. Practical collaboration in stock-taking will promote understanding of balancing operations.

#### 13 *Costing and Calculation*

The apprentice should co-operate in costing and calculation. The concepts in normal use—which will vary with the undertaking—should be familiar to him (e.g. purchase price, cost price, manufacturing costs, production costs, prime cost, etc.). Undertakings which keep a settlement sheet should associate the apprentice with its production.

An appreciation of the firm's accounts is also promoted by work in the accounts sections of the wages, investment and stores departments.

#### 14 *Stock Control*

The apprentice should become acquainted, by way of practical work, with the control of stock according to the type of his undertaking (e.g. for office materials), including ordering, delivery, storing and maintenance, issuing, stock survey, stock-taking and stock control, control of consumption differences in quality and price, complaints. He should be familiar with the basic principles of industrial store-keeping.

## *15 Elements of Industrial Organization and the Use of Organizational Aids and Office Machines*

If possible, the apprentice should be given a general view of the undertaking and its organization right at the outset of his apprenticeship. In the course of the training, the organization of the undertaking is to be explained to him. He should become acquainted with organizational aids and working methods and appreciate their special economic relevance to the undertaking. He should be instructed in the opportunities for the employment of the usual office machines (booking and counting machines, dictating appliances, etc.). So far as possible, he should learn how work is planned, what is understood by work preparation (planning, regulating, supervision).

Decisive importance is attached to an appreciation of sensible industrial organization and of methods for rationalising the undertaking.

Training in economic thought and practice is thus one of the main elements of the apprenticeship.

## *16 Wages and Social Insurance*

The apprentice should be able to carry out the calculation of gross and net wages. He should learn how to work with wage and salary tables. This includes the requisite knowledge of the principal rates and statutory regulations of the wages tax and social insurance. He should be instructed in the procedure for making payments to the social security authorities and to the Finance Office.

## *17 Elements of Personnel Work*

The apprentice should be acquainted with the basic features of personnel administration. He should become accustomed to co-operation with the personnel officer. He should be instructed in the basic provisions of the law on labour contracts and in the practical application of the principal provisions of labour and social law. The apprentice should be acquainted with the competent trade associations (chambers, associations, trade unions).

## *18 Elements of Taxation*

The apprentice should be acquainted with the types of taxation most relevant to his undertaking and with the computation and discharge of the tax payments regularly falling due. It is desirable that he should be associated with the preparatory work for the tax declaration and made familiar with the forms in use for this purpose.

## *19 Elements of Insurance*

The apprentice should be acquainted with the types of insurance both of persons and objects which are relevant to his undertaking. He should take part in the work done in cases of damages.

## 20 *Elements of the Principal Statutory Regulations of Commercial Practice*

The apprentice should gain an elementary knowledge of the principal relevant regulations of civil, trade and company law and of industrial law. This includes, e.g. provisions of the law of commercial contract, such as offers, acceptances, delay, reminders, complaints, place of settlement, competency of the court, etc. He should know about the principal legal categories of commercial undertakings and understand the significance of the relevant registers.

## 21 *Introduction to Economics*

The apprentice should be instructed as to the economic conditions in the branch of the economy to which his undertaking belongs. He should gain an appreciation of the position of his undertaking in the economy as a whole.

### *Desirable*

## 22 *Introduction to the Principles, the Possibilities and the Effects of Mechanical Data Processing*

Where possible, the apprentice should be given an opportunity of becoming acquainted with the basic features of the mechanical processing of data and the possibilities of its employment in the undertaking.

### EXAMINATION REQUIREMENTS

The Apprenticeship Final Examination is held by the competent Chamber of Industry and Trade in accordance with its Examination Regulations. The content of the examination is determined by the requirements laid down in the Occupational Specification and elucidated in greater detail in the Vocational Training Programme.<sup>1</sup>

### *The Written Examination*

Topics for essays, and problems, are set in business management and correspondence, in commercial arithmetic and in book-keeping.

**Essay :** The candidate has to show that he can treat a topic with factual accuracy, consistency, verbal skill and in correct spelling. A number of topics are presented for selection, one of which has to be dealt with.

**Time :** approx. 1½-2 hours.

**Business Management and Correspondence :** The candidate has to show the requisite knowledge of business management in his written answers to a series of questions.

<sup>1</sup> Where the Chamber of Industry and Trade and the Chamber of Craft Trades hold the examination jointly, the Examination Regulations agreed between them are valid, without prejudice to the Examination Requirements.

He has to write a letter arising out of a simple case from commercial practice. The candidate has to show that he can draft a letter of this kind which is correct both in form and content.

Time : approx. 1½-2 hours.

*Commercial Arithmetic* : The candidate has to show that he can carry out the principal arithmetical processes occurring in commercial practice in a correct manner. A number of problems are set.

Time : approx. 1½-2 hours.

*Book-keeping* : The candidate has to show that he is familiar with the basic principles of book-keeping, including the organization of accounts and is able to draw a simple balance.

Time : approx. 1½-2 hours.

### *The Oral Examination*

The oral examination is held in the form of a free conversation. It should provide an opportunity of gaining a personal impression of the candidate. The starting point should be discussion of practical problems occurring in the undertaking, and questions arising out of the written examination or entries in the report.

*Shorthand and Typing* : Proficiency in shorthand and typing shown in one of the Chamber's examinations can be duly taken into account in the total evaluation of the candidate.

## ANNEXE B

### TRAINING REGULATIONS FOR OFFICE APPRENTICES IN DENMARK

Under the 1937 Act, if a trade committee decides that there should be regulations governing training in an occupation with which it is concerned, and subject to the agreement of two-thirds of its members, it can submit training proposals for that occupation to the Central Apprenticeship Council. The Council may then give effect to these proposals, which become binding on employers of apprentices in that occupation or trade.

The Council having received from the appropriate Committee training proposals for the training of apprentices in office work, therefore lays down the following rules, which provide the minimum standard of training in this field.

.....  
.....  
A contract drawn up with an apprentice to be engaged in office work must be in one of the following forms, in order to ensure that the apprentice receives the training detailed below.

- (1) 'The apprentice is engaged with a view to instruction in office work.'

In this case the apprentice shall have the opportunity of carrying out all work appropriate to the offices of the undertaking and the industry in which it operates (for example, filing; sorting and distributing mail; serving customers; telephone enquiries; writing out of order notes, notices of despatch and invoices; calculations; stock control; correspondence and typing—in foreign languages as well as Danish if possible—from dictation or copy, and on a typewriter where one is available; those aspects of book-keeping and cash control which are customarily carried out by junior personnel; insurance; shipping; and bank transactions). In addition, the apprentice should acquire knowledge about the industry in which he works.

- (2) 'The apprentice is engaged for training in office work, as detailed below.'

On the other side of the apprentice contract may then be added :  
*Either* (a) 'Training comprises office work relevant to the firm with the exception of.....'

One of the following functions may then be excepted—book-keeping or correspondence.

Otherwise the training should be similar to that prescribed in (1) above.

*or* (b) 'Training includes book-keeping in connection with other office work.' In this case the main emphasis in the training shall be put on instruction in functions connected with the undertaking's book-keeping (for example, keeping of cash book, journal, sales records, bills of exchange, records of debits and credits, and other financial records which are ordinarily kept by general office staff). The apprentice shall be given an insight into book-keeping systems in the undertaking. The apprentice shall furthermore take part in the checking of bank transactions etc.). Up to one-third of the period of apprenticeship shall be devoted to the most appropriate of other office duties mentioned in section (1) above.

*or* (c) 'Training shall include correspondence in connection with office work.' In that case the main emphasis in training shall be given to instruction in shorthand and typing, including in all cases Danish Stenography.

If the undertaking's correspondence involves foreign languages, the apprentice should be given on suitable occasions the opportunity to write letters in these languages, or in at least one of them, in order to develop his knowledge of languages.

Up to one-third of the apprenticeship shall be devoted to other relevant aspects of work in the office, as detailed in section (1) above.

Under Contracts of type (1) or (2) (a) above, apprentices may spend some months of their training period on work in the undertaking's stockroom so as to acquire a knowledge of the products of the undertaking, on the condition that this is clearly laid down in the contract.

The agreed period of apprenticeship shall be written into the contract; it shall be at least three years but not more than four, although where the apprentice has taken the State Commercial Examination or Higher Commercial Examination, the apprenticeship period may be reduced to two years.

If the apprentice has not previously taken the Commercial Assistant's Examination, the Commercial Examination or the Higher Commercial Examination, he shall follow a course leading to the Commercial Assistant's Examination in one of the commercial schools recognised by the Board of Trade.

*Approved by the Central Apprenticeship Council, 12th December, 1939.*



## ***British Association for Commercial and Industrial Education Course:***

### **'BACKGROUND TO TRAINING FOR THE OFFICE'**

1. In the summer of 1965, BACIE consulted a number of member firms on trends in clerical training. It was found that, except in the largest firms, few training officers specialised in commercial and clerical training and many had limited experience in a commercial function. Moreover, many companies who prided themselves on their commercial training schemes, concentrated mainly, or only, on one or two types of trainee.
2. As a result of these findings, BACIE decided to design a course for training officers whose duties included the training of office staff. The course concentrates on the following :
  - (a) Identification of training needs of office staff, particularly by using the analytical approach.
  - (b) Training methods and organisation of training for clerical workers, secretaries, office supervisors and computer personnel.
  - (c) Background information on office mechanisation and computerisation, job grading in the office, influence of the Industrial Training Act, provision of commercial education. The syllabus and programme of the course 'Background to Training for the Office' are designed in the light of these priorities.
3. The main items in the programme are :
  - Changing Trends in Office Education and Training.
  - Routine Clerical Operators.
  - Analysing Secretarial Needs.
  - Training of Secretaries.
  - The Provision of Commercial Education.
  - Commercial Apprenticeships.
  - Towards the Electronic Office.
  - The Training of Computer Personnel.
  - Training Office Supervisors.

Lecture and discussion sessions are supplemented by working on a project in small discussion groups.
4. The course, which has become a regular feature in BACIE's programme, is primarily intended for three groups of managers having responsibility for the training of office staff :

- (a) training officers in commercial firms ;
- (b) departmental managers in commercial firms who are responsible, *inter alia*, for training office staff ;
- (c) training officers in manufacturing industry whose duties extend to commercial as well as technical staff.

5. The course is residential and lasts from Monday afternoon until Friday lunch-time. The fee charged is 40 guineas for members of BACIE and 45 guineas for non-members. Enquiries should be directed to the Assistant Head of Training Services at 16 Park Crescent, Regent's Park, London, W.1.

## **Training Schemes for Commercial and Clerical Employees**

*The Training Schemes, included in this appendix, give details of Planned Programmes of Practical Training in the Establishment; Details of Associated Further Education have not been included.*

### **SCHEME 1. TRAINING ADMINISTRATIVE AND PROFESSIONAL TRAINEES**

(Engineering Industries Group Apprenticeship)

#### **I Introductory (1 month)**

Instruction in Office and Works rules and routine, Factory Acts as they apply to work people, safety appliances and accident procedure, organisation, products and services of the firm and its relation to the industry, objectives of training and importance of theoretical study. Introduction to clerical routines.

#### **II Basic Training (12-16 months)**

The object of Basic Training is to enable the student to obtain a thorough knowledge of the products, processes and administrative routines of the Works.

The sequence of training may vary, e.g. start in Production Control, then Stores, etc.

##### **(A) THE STORES ORGANISATION**

- (i) Procedures and routines for receipt and checking incoming goods.
- (ii) Inspection, discrepancies, damage and claims.
- (iii) Allocation of storage and security of stocks.
- (iv) Routines for issue of stocks and return of stock to stores.
- (v) Storage and operation of stock yards for high risk items, e.g. oil, spirit, explosive and other stores.
- (vi) Operation and routine employed in central, departmental and sub-stores. Care and disposal of packages and scrap. Care and cleanliness of buildings and stocks.
- (vii) Stores equipment, special storage facilities, internal transport and conveying methods. Special hazards and accident prevention.
- (viii) Warehousing and distribution of product.

## (B) GENERAL ACCOUNTING

- (i) Book-keeping, preparation of invoices and records.
- (ii) Sales and Purchases Ledgers.
- (iii) Day Books.
- (iv) Mechanical aids to accounting.

## (C) THE WORKS ORGANISATION

The intention in this period is to give the student sufficient knowledge of the practical work of a manufacturing organisation so that he will be able to deal logically with the administrative problems which he later meets.

### (a) *Products and Processes*

A sight of and explanation of factory operations, including—

- (i) Machining operations.
- (ii) Assembly and Benchwork.
- (iii) Inspection.
- (iv) Test.

During this period, opportunities should be given to observe—

- (i) Forming processes, such as foundry, die-casting, plastic moulding, presswork.
- (ii) Jointing processes, such as gas and electric welding.
- (iii) Protective finishing such as plating, finishing.
- (iv) Heat treatment processes (when applicable).

### (b) *Design, Development and Planning*

- (i) DO practice and conventions, printing, recording, reproduction and distribution.
- (ii) Preparation of parts lists and schedules.
- (iii) Modification procedures.
- (iv) Planning production, operation layouts, tooling procedures.
- (v) Technical investigation procedures.
- (vi) Clerical routines and their operation.

## (D) PRODUCTION CONTROL

- (i) Methods and routines for Works' programmes and schedules.
- (ii) Preparation of records.
- (iii) Stock recording and control, physical and clerical.
- (iv) Progressing work through the Production departments.

#### **(E) WORK MEASUREMENT AND INCENTIVES**

This experience is intended to give the student an understanding of the determination of work values as a basis for his work in the Cost Office.

- (i) Introduction to Work Study :
  - (a) Method study.
  - (b) Time study.
- (ii) Observation and recording of method.
- (iii) Taking and extending Work Studies.
- (iv) Determination of work values.
- (v) Study records, Work and Job specifications.
- (vi) Methods of Incentive payment.
- (vii) Production studies.
- (viii) Wages structure and bonus calculations.
- (ix) Labour cost control.

#### **III Common Aspects of Administration (18-20 months)**

The object of the second part of Basic Training is to gain experience in the main administrative departments of the Company—Costing, Purchasing, Secretarial Practice, Sales, Transport. In this period the student will be given limited experience in all facets of administration so that he will have a sound basic knowledge before he starts to specialise.

#### **(F) COST ACCOUNTING**

- (i) Application of costing to manufacturing, cost measurement.
- (ii) Division of costs, with reference to control and absorption of overhead costs.
- (iii) Preparation of cost statements.
- (iv) Cost reduction.
- (v) Preparation of cost data and comparative cost budgets.

#### **(G) PURCHASING**

- (i) Determination and control of quality and quantity.
- (ii) Factors in determination of supply sources, prices, budgets.
- (iii) Influence of trade associations and Government controls.
- (iv) Purchasing routines and procedure, authority to purchase, quotations, selection of supplier, issuing order or contract.

#### (G) PURCHASING (contd.)

- (v) Acknowledgment, progress receiving and inspection.
- (vi) Certification of invoices, cancellation of orders, rejection of goods.
- (vii) Import and export purchasing.
- (viii) Disposal and surplus and scrap material, packages.
- (ix) Purchasing department records.

#### (H) ACCOUNTING AND SECRETARIAL PRACTICE

- (i) Office organisation and clerical routines.
- (ii) Computation of wages, recording, posting and analysis of wages. Calculation of bonuses, deductions.
- (iii) Mechanical aids and their application to accounting.
- (iv) Book-keeping, nominal ledgers, records of cash, credit and sales transactions.
- (v) Preparation of trading accounts, Profit and Loss balance sheet.
- (vi) Methods, systems, forms, machines and appliances.
- (vii) Conducting correspondence, filing and internal communication.

#### (I) TRANSPORT AND COMMUNICATION

The purpose of this experience is to make students familiar with all forms of communication, particularly the legal aspects.

- (i) General conditions applying to all forms of transport. Conditions of carriage, customs procedures, claims, insurance, method of checking carriage charges.
- (ii) Law relating to transport. Stoppages, liabilities, contracts of carriage, liability for accidents.
- (iii) Railway transport, risk rates, agreed charges, delivery charges, carriage of goods.
- (iv) Road transport. Private and public carriers. Contract hire, types of vehicles, methods of charging.
- (v) Docks and internal water-ways.
- (vi) Marine transport. Liner and tramp services, chartering, FOB, CIF, Bills of lading. Charter parties. Documentation. Methods of charging.
- (vii) Air Transport. Internal and international services, restricted merchandise. Documentation for air transport, methods of charging.
- (viii) Postal services. Postal charges, letters and parcels, registration, insurance, express services, air mail.

## (J) SALES

- (i) Organisation of department, clerical routines and administration, records, preparation of estimates, quotations.
- (ii) Determination of field of sale.
- (iii) Field organisation, representation and point of contact.
- (iv) Marketing, home and overseas.
- (v) Distribution arrangements.
- (vi) After sales service, depots, despatch arrangements.
- (vii) Retail organisations.
- (viii) Publicity media and advertising.
- (ix) Sales promotion techniques.

## (K) SPECIAL ASSIGNMENTS

During the last three months of the Basic Training, students should be given short special assignments, for example :—

Examine and report upon the liaison and communication between the Sales Department and Production Departments.

Each assignment should be selected to produce worthwhile information, at the same time giving the student an opportunity to demonstrate his ability to recognise a problem and offer constructive suggestions as to its solution.

## SCHEME 2. TRAINING FOR CERTIFIED ACCOUNTANTS

*(Electrical and Electronic Products Firm)*

### Training Schedule

#### 1 *Wages Routine*

(a) Time or Booking Clerk	Batch Production Factory	1 Month
	Mass " "	1 "
(b) Shop Clerk	Mass " "	2 "
(c) Wages Department— all functions	Batch or Mass " "	3 "
(d) Cashier's Department	Batch or Mass " "	1 "
2 <i>Time Study Department</i>	Batch or Mass " "	1 "
3 <i>Personnel Department</i>	Batch or Mass " "	2 Weeks
4 <i>Goods Inwards</i>	Batch or Mass " "	2 Weeks
5 <i>Despatch</i>	Batch or Mass " "	2 Weeks

<b>6 Accounts Department</b>			
(a) Sales Ledger	Batch or Mass „ „		1 Month
(b) Bought Ledger	} Batch or Mass „ „		3 Months
Purchase Abstracts			
Invoice Checking			
Price Difference A/c			
<b>7 Stores Ledger</b>			
White Card System	} Mass Production Factory		3 Months
Hand Posting			
Punched Cards		Batch „ „	1 Month
Summaries			
Delivery Sheets			
Test I Ledgers			
<b>8 Plant Inventory</b>			
Ledger entries	Mass Production Factory		2 Months
Capital Budget			
Procedure etc.			
<b>9 Maintenance Costing</b>			
	Mass Production Factory		1 Month
<b>10 Laboratory Costing</b>			
	Batch or Mass „ „		1 Month
<b>11 Accounting</b>			
Central Book-keeping	Mass Production Factory		9 Months
	Batch „ „		3 „
<b>12 Factory Administration</b>			
Job Costing and Results	Batch Production Factory		3 Months
Book-keeping, etc.	Batch or Mass „ „		6 „
Material and Labour			
Loss Statistics,			
incl Test I Books, etc.	Mass „ „ „		3 „
<b>13 Estimating Department</b>			
Standard Pricing	Mitcham		1½ Months
Technical Clerical	Batch or Mass Production		
Assistant	Factory		1 Month
<b>14 Production Control and Planning</b>			
	Batch or Mass Production		
	Factory		1 „
	Machine Shop Mitcham		1 „
<b>15 Purchasing Department</b>			
			1 „
<b>16 Commercial Administration and Concern Accountancy Departments</b>			
			8 Months
			60 Months



### **SCHEME 3. COUNTING HOUSE JUNIOR TRAINING SCHEME**

*(Department Store)*

#### **I Aim**

To give each Junior a working knowledge of the Counting House with a view to specialising and filling vacancies for Clerks, Machine Operators and Chief Customs Office Staff.

#### **II Age**

Girls and Boys 15-17 years.

Boys will be the minority in training.

#### **III Type of Entrant**

- (1) A girl or boy who:
  - (a) wants clerical work but does not want to be limited by "four walls",
  - (b) appears to be methodical, painstaking and sufficiently intelligent to submit to the discipline of training, and
  - (c) will make an agreeable employee and colleague.
- (2) Education — Secondary Modern, Comprehensive, Technical, Grammar, the last three should be the source of promotable types.

#### **IV Length of Course**

1 year.

#### **V Content of Course**

- (1) Each Junior is given the experience of working in the following offices:—

Chief Cashier's Office	Bought Ledgers	Dissecting
Wages	Cost and Sales	Sales Ledgers

- (2) The time spent in each office is two months.
- (3) The Junior is supervised by the Manager or Supervisor of each office and duties in addition to the office work allocated include:
  - (a) responsibility for the tidiness of the Manager's desk and other office furniture,
  - (b) answering the telephone,
  - (c) acting as office messenger.
- (4) An hour each week is spent in the Training Room under the guidance of the Staff Trainer.

#### **VI Up-grading**

After the training period suitable vacancies are discussed with each Junior and a choice of employment is offered.

## VII Syllabus for Weekly Training Period

- (1) Tour of House.
- (2) Visits to Central Stores, Despatch, Returns Room, Export.
- (3) Duties of an Office Junior:
  - (a) Manager's Desk,
  - (b) Delivering messages,
  - (c) Telephone procedure,
  - (d) Conduct and approach to Buyers/Managers/Colleagues,
  - (e) Appearance.
- (4) Technical Knowledge General:
  - (a) Card Index and filing,
  - (b) Methods of duplicating.
- (5) Counting House System and Knowledge:
  - (a) Dissecting,
  - (b) Bought Ledgers,
  - (c) Sales Ledgers,
  - (d) Payments—types in use Cash/Account/Export,
  - (e) Wages Office—National Insurance,  
PAYE,  
Pension Scheme,
  - (f) General Accounts,
  - (g) Sanctions,
  - (h) Stock Control.

### SCHEME 4. TRAINING FOR CLERICAL AND COMMERCIAL STAFF

*(Iron and Steel Company)*

#### Recruitment and Selection

Approximately one dozen trainees a year are recruited to fill vacancies on the clerical side of the company. The minimum requirements for commercial trainees are entry qualifications to ONC (i.e. four 'O' levels comprising Maths, English and two other subjects); but it is not always possible to obtain these. What is required is a boy with the *potential* to achieve at least the ONC in Business Studies, preferably the HNC and more preferably still the HND. However, the main aim is to recruit a cross section of a somewhat indeterminate range of ability, rather than the best dozen applicants, resulting in a spectrum of abilities to cover the jobs available.

Selection is generally through interviews, coupled with school reports and records of school achievements (looking especially for evidence of *application*). Use is made of the Youth Employment Service. Within the dozen or so trainees recruited each year, one-third will probably be 18 year olds with one or two 'A' level subjects. However, the academic quality of 'A' level entrants is usually less than that of those who proceed to University or College of Advanced Technology.

### Induction Course

Training begins with a ten-week Induction Course for all recruits. At recruitment, final placing in a job is not anticipated, and so all trainees go through the same scheme of induction training together, irrespective of age or qualification at entry.

The first two weeks of the Induction Course comprise a course in *Basic Office Skills*, in which trainees deal with "Communication" in its widest sense. Trainees are given as many practical exercises as possible, so that they are trained by doing. Oral communications are dealt with first, with practice in discussion. Written communications follow, with letter writing, report writing, and exercises in both. A study is also made of internal communications systems such as the telephone system, teleprinters, tannoy and closed circuit television. Trainees are shown all these in operation in the works, and are given practical experience in their use. Trainees also see copying, i.e. document reproduction and duplicating machines. They visit the department concerned, to see the types of machinery used and to do a practical exercise in designing a form. Next, trainees look at filing systems and study the advantages and disadvantages of centralization and decentralization, followed by an exercise in designing a filing system for a firm with 100 customer addresses. Calculating is covered by a talk, followed by a visit to the Central Calculating Department to watch demonstrations on the comptometers, and to do a practical exercise in basic calculating on the machines. Coding follows, with a description of the need for coding, the systems used, and an exercise in producing a quality code. Punched Card Computing (Hollerith) is also covered by a visit to the department and explanatory talks and exercises.

After the Basic Skills Course, the trainees proceed to a three-weeks' *Order Processing Phase*. The purpose of this is to follow through an order from the moment it is received to the moment that the final product is delivered to the customer. Trainees follow the sequence right through to see what is involved in processing each piece of paper. This begins at the Sales Department from which representatives come to give talks to the trainees about the Sales Organisation of the company and of the parent group. This is followed by exercises in replying to sales letters and in making out quotations etc. Next comes a visit to the Order and Invoice Depart-

ment, with practical exercises on the flexowriter. Following this a visit is made to the Ingot and Billet Production Control, where talks are given on such things as master specifications and production control techniques, and practical exercises are done in preparing copies. Visits are also made to other parts of the works to see, for example, the computer controlled billet cut-up line and the billet bank. The whole sequence follows the pattern: "enquiry, order placed, order fulfilled"; and details of shipping and export are also included. Following this, two weeks are spent dealing with the payment side in the *Cashier's and Personal Accounts Department*.

Accounting is dealt with in a separate phase, covering Stores, and Stores Control (including practical exercises in store-keeping followed by a trip around the Stores themselves), the Secretarial Department, and the Wages Department (where procedures are explained and practical exercises are done, such things as time-keeping and wage cards). Costs are covered in talks by the Chief Cost Accountant, followed by a practical exercise in one of the melting shops, in which the object is to prepare a cost report based on observations of the materials used in the department. A similar pattern is followed for Stores Accounts and Financial Accounts.

The final phase of Induction training is a *broadening of experience* for two weeks, by visits to other departments such as the Bar and Rod Mill, Spring Works, Cold Rolled Strip Department, Stainless Works, etc., each visit being accompanied by a talk from the head of the office department concerned. The Group Engineering Workshops are also covered, together with Plant Inventory and the Labour Department. This phase follows a week's *revision and recapitulation* period, and is itself then followed by a written examination.

### Further Training

A schedule is drawn up showing for each trainee his age, school, qualifications, details of further education, College of Further Education attended. Each trainee is then interviewed and his personal preference for final placement is added to this schedule. A panel comprising the Education Officer and his assistant, together with senior heads of the clerical services, then assesses each trainee on the basis of the information already assembled on the schedule through training and from a second interview. The panel then gives an opinion as to where they think he will eventually go when training is completed in four years' time. Each trainee then begins a sequence of four attachments, each of a year's duration, in a group of offices. Departments are gathered into groups (called "associated departments") for this purpose, centred on the department of the trainee's eventual predicted choice. This system enables a trainee to become part of the standard manning of the department for the full year of his attachment. Hence, although he is still undergoing training, a trainee is not supernumerary but is actually doing a full-time job.

This does mean, however, that the onus for further training rests squarely on the shoulders of the head of the department concerned.

## **SCHEME 5. GIRLS' TRAINING SCHEME**

*(Iron and Steel Company)*

### **1 Recruitment**

#### **(a) NUMBER**

During the early summer of each year a review of present staffing and future requirements is conducted by the Education Officer and the Secretary. A decision is taken about the size of the intake. In recent years this has been 15 to 20 per year.

#### **(b) QUALITY**

Only girls over the age of 16 direct from schools are recruited, the product of Grammar School Vth form and extended courses in secretarial studies.

#### **(c) SELECTION**

All applicants are interviewed by the Education Officer and the Girls' Training Supervisor. A short list of about 25 is submitted to the Secretary for his final selection.

Although engagements are made before external examination results are available, from interview and headmasters' comments every effort is made to engage only the most academically strong applicants. Although no absolute minimum standard is applied at GCE, RSA, or CSE educational level, the entrants to the scheme must be readily trainable to a point at which they can quickly and competently make a contribution in a field of work which is constantly changing and making increasing demands on expertise and adaptability.

### **2 Training**

There are three elements to the formal training:

#### **(a) INDUCTION**

A very general introductory course of one week's duration including process talks, visits and films.

#### **(b) CENTRAL TRAINING COURSE**

All girls undergo an eight week course in the Girls' Section of the Training School, following a carefully worked out syllabus including English, maths, accounts, oral and written communications, typing, duplicating, filing and practice in other clerical procedures.

Full use is made of films, visual aids, talks by office supervisors and integrated visits and projects. Additionally, the supervisor collects work from many offices and the typist pool to give practice in typical office tasks.

### (c) WORKS ATTACHMENTS

Each girl undergoes a minimum of three attachments to office departments (e.g. Typing Pool, Post Room, Wages, Works Office, Personal Accounts, Sales Invoicing and Stores Accounts). The purpose of each attachment is clearly defined. This experience of junior clerical work in a supernumerary capacity forms a useful basis for subsequent placing.

### 3 Placing and Further Training

Vacancies occur sporadically throughout the year for typists, accounts clerks, comptometer and computer operators, general clerks and junior secretaries. The minimum period under full training for these positions is three months but this period could be extended over one year.

The following criteria are used to select for specific vacancies:—

- 1 The proved ability of the girl
- 2 Her own personality and wishes
- 3 Reports from section heads during the periods of attachment
- 4 Reports from her college tutor.

### SCHEME 6. TRAINING OF MACHINE OPERATORS

*(Pharmaceutical Manufacturers and Retailers)*

#### 1. Training is divided into two categories:

##### (a) INITIAL TRAINING FOR MACHINE OPERATOR

- (i) School leavers ;
- (ii) Young people who have joined the Company from other employment ;
- (iii) A small proportion of girls already in the Company's employ, who are recommended for full-time training as machine operators and transferred to the training department for this purpose.

##### (b) CONVERSION AND RETRAINING COURSES

Those sent by their departments from time to time to acquire skills in other machines. The time taken to train an operator in this category depends upon the machine and the requirements of the department, as well as the competence of the operator. In some cases these girls will attend full-time, but in most cases part-time training is all that is required.

##### FULL-TIME INITIAL TRAINING

2. All such trainees join into a preliminary course. This is normally of three weeks' duration. All trainees are taught to use the add-listing

types of machines during this period. They are trained on both the simplified and full keyboard types of machines. When they have become familiar with the machines, practical applications are demonstrated and taught and they are given exercises of actual work to do.

3. In order to create interest in clerical work they are also given various exercises which are designed to help them acquire some knowledge of business accountancy terms, sorting and filing and simple calculations.

4. Nearing the conclusion of this preliminary course the trainees may opt for further training either as a calculating machine operator or as an accounting machine operator. For both high standards of accuracy are required.

5. For those wishing to proceed to calculating machine training it has been found essential that they have high arithmetical skills, and they must pass an arithmetical test. If they should fail they might then undertake a brief refresher course in basic arithmetic and in many cases this enables the trainee to reach the requisite standard.

6. Many girls opt, however, at the end of the preliminary course for accounting machine training, for which the standard of competence in arithmetic required is not as high as for calculating machine operators.

#### CALCULATING MACHINE TRAINING

7. We give a 'basic course' on the key-driven type of calculating machine. On completion of this course an operator will be able to work out most types of calculations including decimals, percentages, discounts, etc. (The course does not include specialised knowledge required by certain departments, for example costing, but this instruction can easily be given after the basic course is completed.) The time to complete the basic course varies according to the ability and speed of the trainee. Some girls need far more help than others. Some are able to complete the course with the minimum instruction by merely working through the manual; others have to be given additional exercises and further instruction. The length of the course can vary for individuals and will reflect their speed, competence and accuracy. On average it is about ten weeks in duration.

8. Tests are given at various stages throughout the basic course. Trainees are not allowed to progress from one stage to the next until they have passed a test with a mark of at least 90 per cent. Speed and accuracy tests are given towards the end of the course and these are designed to increase the working speed gradually. A final test is set by the head of the training department and the pass mark is over 90 per cent.

9. After completing the course satisfactorily, if a girl is not required to fill a vacancy immediately, she will be given instruction in the use of other calculating machines.

#### ACCOUNTING MACHINE TRAINING

10. At the conclusion of the preliminary course a group will proceed to accounting machine training. The machines used are National Cash Register Accounting machines.

11. The basic course which covers keyboard, general principles and features of the machines, how to change a programme bar and so on, takes an average of one full working week, or five days. After completing this part of the training the girl will then have to specialise and be trained for a particular department, for example, Statistical Work, Ledger Posting (Cashiers) and Payroll. The time taken to complete the training varies according to the work involved. For payroll work an operator will need to have some knowledge of Income Tax and be able to read the Tax Tables easily. An operator dealing with Ledger Posting will have to be able to complete 1,000 line postings in one day on completion of training.

### SCHEME 7. TRAINING FOR SECRETARIAL TRAINEES

#### *(Pharmaceutical Manufacturers)*

Each autumn we recruit a small number of girls with a basic knowledge of shorthand and typing and give them a comprehensive three months' training in secretarial work, so that towards Christmas they are ready to take up posts as Junior Secretaries.

The syllabus includes shorthand-typing, with the emphasis on rapid transcription, English, Office Practice (including filing, duplicating methods, Post Office services, making travel arrangements etc.) and Background Information about the Company (with the aid of films).

Where possible practice is carried out on work which has already been done in various departments, so that everyone becomes familiar with the functions of the principal departments, and would feel at home when working in one of them.

Half way through the training period everyone spends a day or two in one of the offices, in order to obtain some first-hand experience.

Visits are also paid to the Works, the Museums, and Library, as well as to the Mail and Telephone Rooms. Everyone attends one of the regular Staff Induction Courses.

Great care is taken to see that as far as possible trainees go to a department suitable to their personalities and capabilities. Towards the end of the course they are selected to fill existing vacancies which could be in some of the following departments:



Buying Division  
Overseas Division  
Veterinary Division  
Secretariat

Home Sales (Medical) Dept.  
Publicity Dept.  
Marketing Dept.

The necessary qualifications are :

Age 16-18

GCE at 'O' level in at least four subjects, one of which should be English

Typewriting at 35 wpm and Pitman's shorthand at 50 wpm  
(with sound theory)

### **Syllabus for Secretarial Trainees**

#### **TYPEWRITING**

Revision of 'Points Included' in elementary syllabus.

Practice on more difficult MSS (RSA III standard, approximately) and large pieces of tabulation.

Speed practice on routine letters and drafts.

Specialised work—legal, technical (use of templates for formulæ etc.)

Patching stencils, correcting large pieces of work.

*Speed attained*

50 wpm, not more than 8 errors.

#### **SHORTHAND**

Thorough revision of theory and phraseology.

*Speed Practice*

25 per cent on general material, 75 per cent on Company material, graded so that pharmaceutical and medical terms are absorbed.

*Speed attained*

100 wpm on general work ; 120 wpm on pharmaceutical work.

#### **TRANSCRIPTION**

Company letters etc. as dictated above. The standard is 'mailability', bearing in mind:

(1) Set-out as an aid to understanding contents of letters ; and

(2) attractive presentation.

*Speed attained*

30-35 wpm.

#### ENGLISH

- (1) Vocabulary work (GCE 'O' Level +).
- (2) Letter writing:
  - (a) acknowledgements,
  - (b) letters written from brief instructions,
  - (c) 'difficult' letters—complaints, refusals, etc.
- (3) Précis of letters, articles from journals etc. ('O' Level +).
- (4) Grammar:
  - (a) common faults,
  - (b) editing boss's letters.
- (5) Sentence and paragraph construction.
- (6) Comprehension—official reports etc.
- (7) Logical setting out of argument—essays on equal pay etc.

#### SECRETARIAL PRACTICE

- (1) Filing—methods and equipment.
- (2) Use of reference books and finding of facts.
- (3) Taking minutes (London Chamber of Commerce Private Secretary's Diploma films).
- (4) Making travel arrangements.
- (5) Organisation of daily routine. Using initiative.
- (6) Dealing with callers and with difficult situations.
- (7) Money—petty cash keeping, cheques, etc.
- (8) Office machinery—duplicating, photocopying, etc.

#### COMPANY KNOWLEDGE

- (1) History and organisation of the Company.
- (2) Products.
- (3) Who's Who.
- (4) Company procedures.

#### DURATION OF COURSE

Approximately three months, full-time, i.e. 9-5.30 Monday to Friday.

## *The TWI Course for Office Supervisors*

The course aims to develop the basic skills of instructing and communicating, leadership and method improvement through the techniques of discussion, case study, syndicate decision making and rôle playing. The emphasis is on learning-by-doing.

The course may be presented to groups of from nine to twelve office supervisors during a period of one full week or in ten three-hour sessions spread over two weeks. The training is carried out on firms' premises by a TWI Trainer, who may be a member of the firm who has been trained by the Ministry of Labour or a Ministry of Labour Training Officer. For smaller firms, the Ministry organises groups composed of one or more supervisors, from a number of firms, who are instructed by the Ministry's TWI training officers, generally on Ministry premises.

### **Content of the Course**

#### **INTRODUCTION**

A senior member of management opens the course and then hands over to the Trainer.

#### *Examination of an office section (Exercise No. 1)*

A case-study of a section is considered by the supervisors working in syndicates. Spokesmen report their syndicates' assessment of the section's capacity to meet its overall task, the interchangeability of staff on the jobs done in the section, the state of human relations and the efficiency of the work methods within the section.

#### *Supervision—what adds to its complexities?*

A discussion in which the supervisors consider what is expected of them by their management and by their staff.

On the one hand the management expects a supervisor to run his section efficiently, to plan, direct, control, maintain quality, promote discipline and so on. On the other hand the staff look to him, as the representative of the employer, for human treatment, security, worthwhile work, outlet for initiative, advancement etc. Bridging the gulf between the two calls for leadership on the part of the supervisor.

#### *Some foundations on which to build good staff relations*

A discussion of three situations causes the supervisors to consider the importance of treating people as individuals, of preparing people to accept change, of recognising outstanding ability and of helping people to use their ability to the full.

### *Some hints on handling staff relations problems*

Discussion of a case-example accents the importance of getting the facts, weighing them, determining a sound objective, determining the action to be taken, taking it and checking its results.

### *The Sales Office situation*

A case-study revealing three staff relations problems in a section. One is used by the Trainer to coach supervisors in using the hints on handling staff relations problems. The others provide the supervisors with further practice in using these hints.

### *An introduction to interviewing*

A discussion of the factors that affect the success of an interview and consideration of some hints on interviewing.

### *Practice interviews*

These provide the supervisors with an opportunity to test the actions that they worked out in connection with the staff relations problems portrayed in Exercise No. 1 and in the Sales Office situation.

### *Conducting Staff Meetings*

Two staff meetings concerning the Sales Office situation are conducted by the supervisors, these extend the practice in interviewing inasmuch as six of them are involved in each exercise.

### *Assessing the need for training in a section*

Exercise No. 1 is again examined, this time to plan the training required to achieve more interchangeability of staff on the jobs done in the section. The importance of training to a plan is discussed in relation to the supervisors' own sections.

### *The supervisor's part in communication and training*

A discussion of the vital need for effective communication between the supervisor and his senior, with colleagues on matters of mutual concern, with specialists and with staff in his own section.

### *Commonly-used methods of instruction*

The trainer demonstrates the shortcomings of commonly-used methods of instruction in order to promote a discussion on how to transmit knowledge to a learner with greatest effect.

### *Teaching at the desk*

A demonstration is given by the Trainer portraying good instruction in a routine clerical operation. A discussion follows on the teaching methods used by the Trainer. A leaflet 'Teaching at the Desk' is issued and it is seen that he used the advice contained therein and that his teaching had been helped by his use of a Job Analysis. The Job Analysis is fully considered and seen to be a document which facilitates the planning and the success of instruction.

### *Exercises in instructing*

Six of the supervisors are invited to give demonstrations of instructing using jobs that they have chosen from their own sections. After being coached by the Trainer in the preparation of their instruction (Job Analysis) they then demonstrate before the group. Each demonstration is discussed as to its merits and demerits. These demonstrations and discussions increase the supervisor's skill in instructing.

### *Method Study in the Office—Introductory*

A leaflet entitled 'Method Study in the Office' is issued and discussed by the Trainer. He then demonstrates how six basic steps, namely, Select, Record, Examine, Develop, Install and Maintain were used by an Accountant to improve a method of issuing National Savings Certificates to employees in his firm. This is followed by a short demonstration of the principles of motion economy as applied to repetitive work done at a desk or a counter.

### *Method Study in the Office—First exercise*

The supervisors, working in syndicates, study a method of sorting and distributing mail in an organisation. This provides practice in the use of the six basic steps and the principles of motion economy.

### *The critical analysis of forms and related paper-work*

A short demonstration given by the Trainer shows the supervisors that the work content of a procedure is often governed by the layout and content of forms and paperwork involved. A technique of critical analysis is demonstrated and its potential effect on the reduction of paperwork discussed.

### *Method Study in the Office—Second exercise*

Four of the supervisors choose jobs from their sections to provide four syndicate exercises in the application of Method Study to office work. These exercises usually result in an improvement on the original method and the supervisors are coached in the submission of suggestions for improved methods to management for approval.

### *Final Exercise and close of Course*

A paper is issued and studied by the supervisors, working in pairs, which poses problems of staff relations, work method and 'on-the-job' training. A limited time is allowed for consideration and the supervisors then report on the action that they would take on these problems. The Trainer summarises their reports and, in closing the Course, demonstrates how the training given helped members to reach very sound decisions in a relatively short time. Finally he makes the point that similar use of time to consider problems will surely bring good results in the supervisors' own sections.

## ***Further Education Qualifications and Courses in Business and Office Studies***

This appendix contains information about certain qualifications or courses mentioned in the main body of the report.

### **The Certificate in Office Studies**

This award, introduced in 1963, is for young office workers who wish to pursue courses of further education but who do not possess the educational qualifications required for entry to a course leading to the ONC in Business Studies. It constitutes a worth-while award in its own right but is also recognised as an acceptable qualification for entry to the ONC course for students with credits in certain specified subjects.

There are no formal academic standards for entry. The courses are part-time in form and extend over two years with a minimum of 360 hours of study including examination time. They are designed for students who have continued their education until 16 either at school or by way of a course at a college of further education.

The course consists at present of three compulsory subjects, English (including General Studies), Clerical Duties and Business Calculations or Book-keeping. Students also take an elective subject chosen from a range of options which includes Social Studies, Law and the Individual, Typewriting and Office Machinery and Store-keeping.

The administration of the award is in the hands of a National Committee consisting of representatives of the Department of Education and Science and of educational, commercial and industrial organisations. The examinations for the Certificate are conducted by regional and other approved examining bodies under schemes of examination approved by the National Committee.

The first examinations for the award were held in June 1965 when some 1,400 candidates presented themselves. Of these about three-quarters were successful. There are at present 5,700 young people on courses for the Certificate. These figures refer only to England and Wales; there is a separate Scheme for Scotland.

The Scottish Certificate in Office Studies course consists of three compulsory subjects — English (including Oral English), Calculations and Elements of Accounts, and Elements of Commerce—and one optional subject. The optional subject is selected from Current Affairs, Commercial Geography, Typewriting and History of Commerce.

In length of course and in general aim, the Scottish Certificate is similar to that of England and Wales, but colleges can, at their

discretion, accept suitable candidates of 15, though the vast majority of candidates are 16 or over.

Candidates gaining the SCOS Group Certificate are eligible to proceed to a one year, part-time course in a special vocational subject, in which they can gain an Endorsement Certificate. The range of Endorsement subjects includes Export Practice, Shipping Practice, Introduction to Purchasing and Introduction to Costing for Clerks.

The Scottish Certificate in Office Studies plus a 3rd Year Endorsement Certificate will be accepted as an entrance qualification for the Scottish National Certificate in Business Studies.

### **National Awards in Business Studies**

In England, Wales and Northern Ireland these are administered by a Joint Committee. The awards are as follows :

#### *(a) The Ordinary National Certificate (ONC) and Diploma (OND)*

Courses for the ONC and the OND, the one two years' part-time, the other two years' full-time, are designed to give 16 year old school leavers with four or more 'O' level passes in the GCE a basic education in the commercial aspects of business. In 1964/65 some 18,000 students were following them at about 250 colleges. Their standard is roughly equivalent to 'A' level of the GCE.

#### *(b) The Higher National Certificate (HNC)*

The HNC is a two-year part-time course, and at its level is a valuable qualification in its own right. It is one of the awards qualifying for entry to the course for the Diploma in Management Studies, though the Diploma Committee suggests that it would be desirable for candidates to give evidence of further study or of suitable practical experience. The Minimum age of entry to the HNC is eighteen. The student must hold two 'A' level passes in subjects directly related to Business Studies or an ONC in that subject. Applied Economics is compulsory in both years of the course, with two other subjects in each year from a list which includes Costing, Human Relations, Commercial or Industrial Law, Marketing, Application of Statistics, Business Organisation, Production Methods and Purchasing.

In the session 1964/5, 3,000 students were enrolled on HNC courses in 90 colleges.

#### *(c) The Higher National Diploma (HND)*

The HND is a two-year full-time or three-year sandwich course, with an 'A' level entry standard, designed to provide a combination of general and specialised education for business. Economics

is compulsory in all years, and in addition, students must take four subjects in each year from the HNC list of options plus a range of specialist subjects such as Economics of Transport, Distribution, Market Research and Mercantile Law.

1,850 students were following HND courses at 40 colleges in 1964/65.

### **Courses in Business Studies in Scotland**

The Scottish Council for Commercial Administrative and Professional Education conducts the examinations and awards the certificates. They are:

#### *(a) The Scottish National Certificate (SNC)*

The SNC is normally taken after a two-year day-release course beginning at 16 or 17 years of age, and is regarded as equivalent to an ONC in Business Studies with credit passes. The entry qualification is four or more SCE 'O' Grade passes. Candidates must pass in five or more subjects of which English must be one. Other subjects available include Accounting, Costing, Economics, Statistics and Languages. There are at present about 2,000 students following courses for this certificate.

#### *(b) The Scottish National Diploma*

The Scottish National Diploma is taken after a two-year full-time course in eight subjects, most of which are common to the Diploma and the Scottish National Certificate.

#### *(c) The Scottish Advanced National Certificate (SANC)*

The SANC is taken after a two-year day-release course designed for those who hold the SNC or an equivalent qualification. Under a revised syllabus operative from September 1965, students must pass in Business Finance, Business Administration, Human Relations, and in any two from Advertising, Applied Accounting, Applied Economics, Export Principles and Practice, Marketing, Modern Language II, Office Organisation and Methods, Applied Statistics. Courses are being taken by some 50 students.

### **Degrees in Business Studies**

The Council for National Academic Awards is prepared to consider applications from Colleges for approval of honours degree courses in Business Studies planned in accordance with the report, published in 1964, of the Crick Committee on a Higher Award in Business Studies. A number of such courses have already been approved and are under way. There are four or five-year sandwich courses which alternate periods of advanced general education in studies based on the disciplines of Economics, Sociology and Mathematics, with periods of practical training in the employment of a firm.



The Council has also announced that it will consider proposals for complementary sandwich courses in Business Studies at ordinary degree level and that, while it will as a first priority consider sandwich courses of the type recommended in the Crick Report, it does not preclude full-time courses in Business Studies from leading to its degrees.

A number of courses leading to a degree in Business Studies have already been approved and are under way.

### Other courses

In addition to the national awards already mentioned the examining bodies listed below offer a wide range of examination schemes for commercial employees.

East Midland Education Union,  
1 Clinton Terrace,  
Derby Road,  
Nottingham.

Union of Educational Institutions,  
Norfolk House,  
Smallbrook Ringway,  
Birmingham, 5.

London Chamber of Commerce,  
Commercial Education  
Department,  
69 Cannon Street,  
London, E.C.4.

Union of Lancashire and  
Cheshire Institutes,  
Africa House,  
54 Whitworth Street,  
Manchester, 1.

Northern Counties Technical  
Examination Council,  
5 Grosvenor Villas,  
Grosvenor Road,  
Newcastle-upon-Tyne, 2.

Yorkshire Council for Further  
Education,  
Bowling Green Terrace,  
Jack Lane,  
Leeds, 11.

Royal Society of Arts,  
Examinations Department,  
John Adam Street,  
Adelphi,  
London, W.C.2.

Welsh Joint Education  
Committee,  
30 Cathedral Road,  
Cardiff.

The schemes offered by these examining bodies range from examinations in single subjects to schemes for courses in which candidates must pass in a number of subjects in order to gain a Certificate or Diploma. Many of the schemes for subjects or courses are offered at more than one level. Detailed information can be obtained from the publications of the examining bodies themselves; the paragraphs which follow simply set out to give some indication of the awards which are available.

### Single subject examinations

The majority of the examining bodies offer examinations in single subjects. The following subjects quoted in current prospectuses issued by the examining bodies are listed to give an indication of the range and variety of the subjects on offer. Examinations are held in many other subjects in addition to these mentioned here.

#### Commercial subjects

Accounting  
Advertising  
Book-keeping  
Cargo Insurance  
Company Law  
Machine Calculating  
Office Practice  
Salesmanship

#### General subjects

Arithmetic  
British Constitution  
Civics  
Economics  
English  
History  
Languages  
Public Administration

### Courses leading to Certificates or Diplomas for groups of subjects

A number of the examining bodies offer schemes for courses in which the candidate studies a group of subjects in order to obtain a Certificate or Diploma. There are various main types of 'group' courses ranging from junior clerical courses to senior business courses and courses such as those in legal subjects or for cost clerks built round a particular subject or group of subjects to meet the needs of particular fields of commerce.

### Courses for Secretaries

Some of the examining bodies offer schemes for courses leading to Certificates or Diplomas for shorthand typists or for secretaries. Three examples are given below:

- (a) *The Royal Society of Arts* offers a Group Certificate in Secretarial Subjects for which a candidate must pass in certain specified examinations offered by the Society. These include Shorthand and Typing plus Secretarial Duties, Typewriting and English in varying combinations and at various levels.
- (b) For the Private Secretary's Certificate of the *London Chamber of Commerce* candidates must be at least 18 years of age in the year in which they take the examination and must pass in English, Structure of Business, Office Services and Secretarial Duties, Shorthand, Typewriting Duties. They must also satisfy the Examining Board in an interview.
- (c) For the Diploma offered by the *London Chamber of Commerce* candidates must be at least 21 but may enter for the examination at 20 if they hold the Private Secretary's Certificate. Candidates

must pass in English, Private Secretarial Practice, and Office Procedure, a General Paper, an exercise to test ability to produce a report or minutes of a meeting and shorthand and typewriting duties. They must also satisfy an interviewing board.

*The Scottish Council for Commercial Administrative and Professional Education* offers Group Certificates in Secretarial Subjects at Intermediate and Advanced levels. Candidates for the Secretarial Certificate must take English, Commercial and Secretarial Practice, Typewriting and Shorthand *or* Principles of Accounts *or* a Secretarial Language. Candidates for the Advanced Secretarial Certificate must take Clerical Administration and Methods, Commercial Organisation and Administration and Shorthand and Typewriting.

### **Courses of study for examinations in Commercial and Secretarial subjects**

Courses leading to the awards and other qualifications in this appendix are available at colleges of further education throughout the country. Provision naturally varies from one college to another and students should apply to the local education authority for information about what is available at the nearest further education establishment.

MINISTRY OF LABOUR

Central Training Council

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# **TRAINING FOR COMMERCE AND THE OFFICE**

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A Report by the  
Commercial and Clerical Training Committee



**LONDON**  
**HER MAJESTY'S STATIONERY OFFICE**  
**1966**

The Central Training Council has endorsed the Report made by its Commercial and Clerical Training Committee.

The Council proposes to Industrial Training Boards that they should take the recommendations contained in the Report into account when framing their own recommendations under Section 2(1)(c) of the Industrial Training Act, 1964.

*Central Training Council  
Commercial and Clerical Training Committee*

*25th March, 1966*

DEAR SIR JOHN,

I have pleasure in submitting to you, for consideration by the Council, the Report of the Commercial and Clerical Training Committee.

You will recall that the Committee was established, under my Chairmanship, in November, 1964. Its terms of reference were 'to make recommendations to the Council about the guidance to be given to Industrial Training Boards in respect of training for commercial and clerical occupations'. Because we thought it essential to give the Training Boards some guidance as early as possible, the Committee felt it right to concentrate its attention initially on the training requirements of younger office employees, and in particular those entering employment direct from school or college. One of the major considerations that led us to this decision was the very large proportion of boys and girls who, on leaving school, go into clerical work. As we point out, this group constitutes almost 'one-quarter of our future'.

In preparing this Report, the Committee has attempted to distinguish the most important features of successful and well-developed training schemes, both in this country and in other European countries. We feel confident that if the best existing practice can be widely imitated enormous improvements in the training of office staff will be achieved. But that does not mean that we are content to let things rest there. We hope, in due course, to give further consideration to training methods; to analyse more thoroughly some of the key occupations within the commercial field; and, in particular, to consider other levels and types of office employment. We believe nonetheless that the principles outlined in this Report will provide a firm foundation for the development of commercial and clerical training in most firms.

In presenting this Report, the Committee particularly wishes to acknowledge the assistance it has had from its Secretary, Mr. A. W. Brown, and its Assistant Secretary, Mr. J. M. Huskinson.

Yours sincerely,

J. A. HUNT,  
*Chairman.*

SIR JOHN HUNTER, C.B.E.  
*Chairman,  
Central Training Council.*



## **Members of the Commercial and Clerical Training Committee**

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Mr. A. W. Brown

### *Assistant Secretary :*

Mr. J. M. Huskinson

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\*Member of the Central Training Council





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